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Remote Northern Tourism Travel Survey - 1996 -

Summary Report

June, 1997

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I. INTRODUCTION

A) BACKGROUND

Northern Ontario's remote tourism is based on a product with undeniable strengths. Its fishing, hunting, boating, snowmobiling and general appreciation of the near wilderness experience are difficult to match anywhere in the world. Based at least partly on these strengths, it is estimated there was a total of approximately nine and a half million visitors to Northern Ontario, in 1994.

However, until this year, it was difficult to estimate approximately how many of these tourists to Northern Ontario, were visitors to "remote" tourist establishments (those accessible only by plane, boat, snowmobile or private road with a gate.). The Remote Northern Tourist Travel survey reported on in this document, was commissioned by the Provincial Government of Ontario, Ministry of Economic Development, Trade & Tourism, it was conducted throughout 1996, and has allowed for MEDTT to make a projection of the economic impact from this type of tourism.

The study described in the following document was designed to survey travellers who stayed in remote Northern Ontario tourism establishments. Specifically, the study investigated those travellers consuming products of the remote tourism industry, in Northern Ontario from the district of Parry Sound to Kenora. Previous surveys such as, the International Trade Survey and the Canadian Travel Survey, due to their broad focus, were not sufficiently detailed to determine the overall size and impact of the remote tourism industry in Northern Ontario.

Overall, the basic intention of the study was to gather data on visitors' behavioural and attitudinal characteristics and their specific expenditure information. It was hoped the data would be useful in helping the cultivation and development of Remote Tourism products, services and promotion. As well, the data were to be

used to permit a better assessment of the economic size and direct impact of the industry in Northern Ontario.

The study was designed to be substantial enough in scope, to provide data, by month and by destination. It was necessary for the survey to include subtle issues such as, the attitude of visitors towards landscape aesthetics and a measurement of potential impact of mining and forestry operations on future visitation.

The following document provides a summary of the information collected from this survey. The document begins by describing the specific objectives and an overview of the research approach. It continues with the Summary of the Findings and a researcher comment on some of the implications from the findings. The body of this report document provides a more complete review of the Main Findings. As well, the Main Findings section contains an economic assessment of the impact of these visitors to the regions' economy (as developed by Alex Athanassakos of MEDTT).

A complete set of computer tabulations has been supplied to the Ministry, These data were used to formulate the economic projections found in this document. A separate Technical Appendix contains data on the specific methodology used to conduct the study. A copy of the questionnaire used in the research can be found in the Appendix to this report.

I. INTRODUCTION

B) OBJECTIVES

The overall purpose of the study was to survey travellers who consume the products available in Ontario's remote tourism industry, in order to determine their behavioural and attitudinal characteristics and to use the data to ultimately measure the economic size and impact of this Northern Ontario industry.

Specifically the objectives of the research were to:

a) Collect behavioural data from the visitors to remote northern locations, by: destination type of facility and month.

b) Determine, by origin, the annual frequency of visitation to remote tourism establishments and the location of these establishments.

c) Determine visitors' attitudes towards the Northern Ontario remote tourism product.

d) Collect expenditure data by origin, destination and month, as well as, by items of expenditure, on-site and off. The items of expenditure included:

- accommodation
- private and public transportation
- food and beverages purchased
- retail purchases,
- entertainment and recreational expenditures,
- other expenditures

e) Determine the attitudes of visitors, in total and by origin, towards landscape aesthetics and the impact mining and forestry operations had on their level of enjoyment and intentions to revisit the area.

I. INTRODUCTION

C) RESEARCH APPROACH

The research approach involved collecting information from both remote tourism visitors, as well as remote tourism establishments. Operators of remote tourism establishments were contacted and recruited to distribute questionnaires to be completed by individuals to their establishments. The completed questionnaires within each establishment were collected by the operator and forwarded to Research Strategy Group Inc.

Beginning in the summer of 1995, Research Strategy Group contacted or attempted to contact all the Northern Ontario remote tourism establishments identified from the TED (Tourism Establishment Database, MEDTT) database. **For the purposes of this study 'remote' has been defined, as a location which can be accessed only by air, water, rail or private road (with a gate).**

Eliminating operations that had closed or were not in fact remote, the total universe of remote establishments for 1996 was estimated from the research to comprise 508 establishments. This figure is very close to the estimate of 530 establishments derived by the Ministry in the fall of 1996, when its personnel reviewed the TED database.

Out of the total universe, 180 operators, or better than a third of the total, were recruited to participate in the survey. These operators accurately represented the total universe in terms of CD and type of facilities.

The number of facilities determined to be both remote, and also open, varied by time period. Estimates range from a low of 257 remote facilities open during the winter time period (January - March, 1996), through to a high of 1,027 in August.

Again, these numbers compare favourably with those from the Ministry as compiled in late 1996[1].

Estimates of Facilities

Time Period	Facilities Called	Closed	Not remote	Qualifying	Cooperative	As % of qualifying
Winter	1274	1228	179	257	40	16%
Spring	973	446	234	983	351	36%
July	971	454	235	975	340	35%
August	1026	414	224	1027	400	39%
September	1025	437	224	1003	378	38%
Fall/Winter	1077	674	218	773	275	36%

As can be seen, the current survey obtained information from about a third of the facilities estimated to be open in each time period.

Locations chosen for sampling were identified by:

- Month in which they were open
- Region and census district
- The type of facility (outpost, American Plan, etc.)

[1] The Ministry's review indicated a total of 1,394 remote facilities open *at some time during the year.*

- Establishment size (number of facilities per establishment).

There was a winter sample of operators, although very few reported being open before the May 24th weekend. Similarly, almost all operators closed down in the months of November and December.

Operators who agreed to participate in the study were sent a package of questionnaires every month, which they were to distribute to all visitors to their facility, who paid for accommodation. These visitors were asked to complete the survey at the end of their stay so as to be able to provide information about their experiences during their stay.

In order to be able to measure and describe all people visiting remote establishments, even those who did not fill out the questionnaire, information was collected on a monthly basis from each establishment. This information included how many visitors there were in total, to this establishment, the facilities they stayed at, and their origins. This information and other data, were returned along with the completed questionnaires in a postage-paid return envelope, each month.

Over the course of monthly data collection, each participating operator was sent Update newsletter mailings, detailing information passed back to us from individual operators and profiling the success to date. These Updates, along with a bi-monthly bonus prize draw of $1,000, were used to encourage continued participation by operators. Examples of these Updates can be found in the Technical Appendix.

Visitors to these establishments completed a total of 3,611 effective questionnaires (approximately 17% of all visitors to those locations). Since the projections were to be done by location, type of establishment and month, some interpolations were necessary to fill in missing values. This resulted in 4773 questionnaires that were then used as the basis for the projection of the actual number of adult visitors involved with the Northern tourism experience.

Note: Although the data were tabulated by census district divisions, for the purposes of this report, the data have been aggregated into three regions:

Northwest Region:
- Thunder Bay (CD 58)
- Rainy River (CD 59)
- Kenora (CD 60)

Northeast Region:
- Sudbury (CD 52)
- Cochrane (CD 56)
- Algoma (CD 57)

Southern Region:
- Nipissing (CD 48)/ Timiskiming (CD 54)
- Parry Sound (CD 49)/ Manitoulin (CD 51)

II. EXECUTIVE SUMMARY

A) SUMMARY

It is estimated, that 143,000 adult visitors and 10,000 children, made use of remote tourism facilities in Northern Ontario during 1996. Two-thirds of these visitors stayed in facilities located in the Northwestern region, 90% of whom were Americans. Ontario residents represented about 30% of visitation to remote establishments in the Northeast and Southern regions.

Three-quarters of these tourists visited during the summer months (June, July and August). They spent an average of almost $1,300 each within Ontario, amounting to an estimated $183 million, and generating an estimated $206 million of GDP, province-wide.

The remote visitor was an individual who commonly makes such trips; 81% of the remote visitors have made another such trip in the past two years. There was a high incidence of return travel: almost two-thirds (62%) of other trips in the past 2 years have been to remote tourism facilities in Northern Ontario, and 41% to the current remote facility.

The great majority of trips (91%) were made for fishing. Hunting and boating were currently lessor motivators, although these activities seemed to have helped to expand travel into the fall, pulling Ontario residents more than Americans.

Males accounted for 84% of remote visitors. Nature and animal observation seemed to have helped to draw women, although these again, were fairly minor factors.

SUMMARY (CONT'D)

Attitudes to the Northern experience were very positive: 87% were extremely or very satisfied, and almost half (47%) would definitely return to the same establishment. The most important factors they were looking for included: *quality of the fishing experience, quality of the service at the facility, tranquillity and the absence of other people*, and *the untouched nature of the forest.* Unfortunately, 43% (especially in the Northeast) reported they had seen or heard some evidence of logging, primarily clear cut forestry and access roads. For one-in-five visitors (21%), or almost half of those seeing these operations, this is reported as having a negative impact upon intentions to return, although this does not yet seem to have been a major deterrent.

The average visitor spent $1,282 in Ontario on their remote tourism trip; $1,516 for those staying at outposts, where evidence of logging was regarded most negatively. It was estimated that all tourists visiting remote tourism establishments spent $180 million in Northern Ontario and over $3 million in the rest of Ontario, in 1996.

II. EXECUTIVE SUMMARY

B) RESEARCHER COMMENT

1. The Current Situation

The strength of the current situation for the Northern remote tourism market in Ontario, is its ability to roll over, year after year, with little marketing effort. The weakness is its dependence upon a very limited number of consumers of the Northern experience. If their interest moves elsewhere, it could be difficult to build up a new clientele, and again develop the same high level of behavioural loyalty.

The Northern remote tourism market in Ontario is very specifically concentrated, with few locations, and a tight target group. The experience is primarily one of a very good fishing trip, in an isolated, tranquil, 'untouched' environment, with good quality accommodations and excellent service.

The clientele—mostly American men travelling with other adult friends, and spending substantial amounts, is basically very satisfied, and returns year after year. They don't appear to be "avid fishermen", They take only one or two other overnight fishing trips every year. However, there is little "new blood", (recent converts) to Ontario's remote tourism experience, thus little growth opportunity.

II. EXECUTIVE SUMMARY

B) RESEARCHER COMMENT (CONT'D.)

2. Policy Issues

The reliance on so many repeat customers magnifies the importance of providing great care and attention to these customers, responding quickly to any of their concerns. Visitors come for the fishing, and the quality of service. Both these experiences are reviewed positively, and should be considered key strengths.

However, logging is an issue. One of the three most important reasons for consuming the remote Northern product is tranquillity and the untouched nature of the forest. Close to half of current visitors report that they saw or heard some evidence of logging, primarily clear-cut forestry practices and access roads. About half of these visitors reported this had a negative impact upon their intention to return

However, relatively few have moved further, to indicate this is the 'main reason' for not coming back, Nevertheless these few still represent $6–$7 million dollars of business, and erosion from a small base of consumers. Looking further into the future, it must be of great concern that this level of dissatisfaction exists, especially when their satisfaction with their fishing experience is otherwise so positive.

II. EXECUTIVE SUMMARY

B) RESEARCHER COMMENT (CONT'D.)

3. Marketing Action

The fishing is rated positively, but it is the quality of service that receives highest marks. The American Plan facilities, in particular, receive sterling ratings. Other key promotional attributes include the quality of food, and accommodation, as well as tranquillity and the untouched nature of the forest (to the degree this is defensible). The quality of fishing is obviously also key, but fishing could use some further differentiation relative to the available competition elsewhere.

On a more targeted basis, these frequent customers are potential ambassadors for the remote Northern tourism experience. On an 'each one reach one' basis, they can be provided with materials that may not be important to maintain their own interest, but which could be useful to allow them to reach out to their friends of like interest. Their clubs, interest groups, and chosen media should be ascertained to permit targeted marketing efforts. However, further profile would be necessary for this effort.

An attempt to broaden the appeal of the remote tourism product could broaden the tourism base into growth segments. This must of course be done without compromising the central fishing experience.

A hunting experience—to expand tourism into the fall.

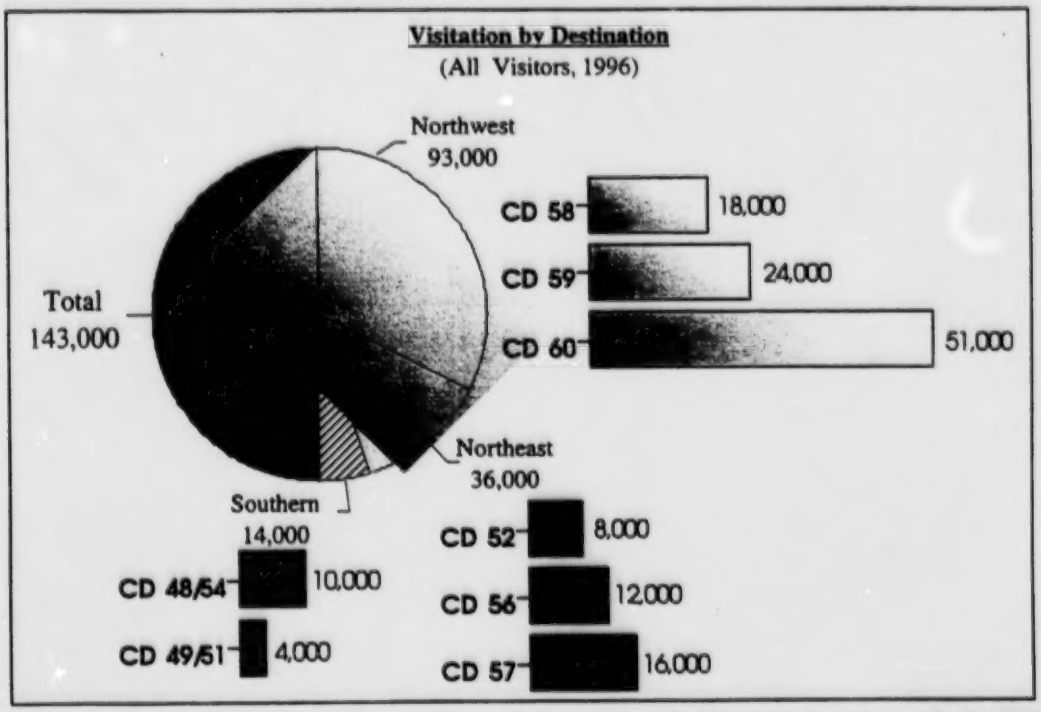
- A nature and animal observation experience—especially for women, and 'playing better' in the more urban environments, like Toronto.
- Housekeeping facilities—more for Ontario residents.
- Campground facilities—more for local residents.
- Tour groups, currently minuscule in their impact.
- Tourism either before or after the main fishing experience, currently very small.
- Snowmobile access, that might help increase travel in the very quiet winter season.

III. MAIN FINDINGS

A) OVERVIEW OF REMOTE TOURISM IN 1996

1. Visitation by Destination

It is estimated, there were approximately 143,000 adult visitors to remote tourism establishments in 1996 and approximately 10,000 children (under 18 years of age) for a total visitation of approximately 153,000 visitors. The focus of this report is on the adult visitors who provided all the relevant information in the summer.



Approximately 93,000 adult tourists visited the Northwest region and 36,000 visited the Northeast region. The Southern region had a visitation rate of 14,000 adult tourists to remote facilities.

The Northwest region Kenora (Census District [CD] 60) received approximately 51,000 adult visitors to remote tourist establishments. Rainy River (CD 59) received 24,000 and Thunder Bay (CD 58) had an estimated 18,000 adult visitors.

In the Northeast region; Algoma (CD 57) received almost 16,000 visitors, with Cochrane (CD 56) at 12,000 and Sudbury (CD 52) at 8,000.

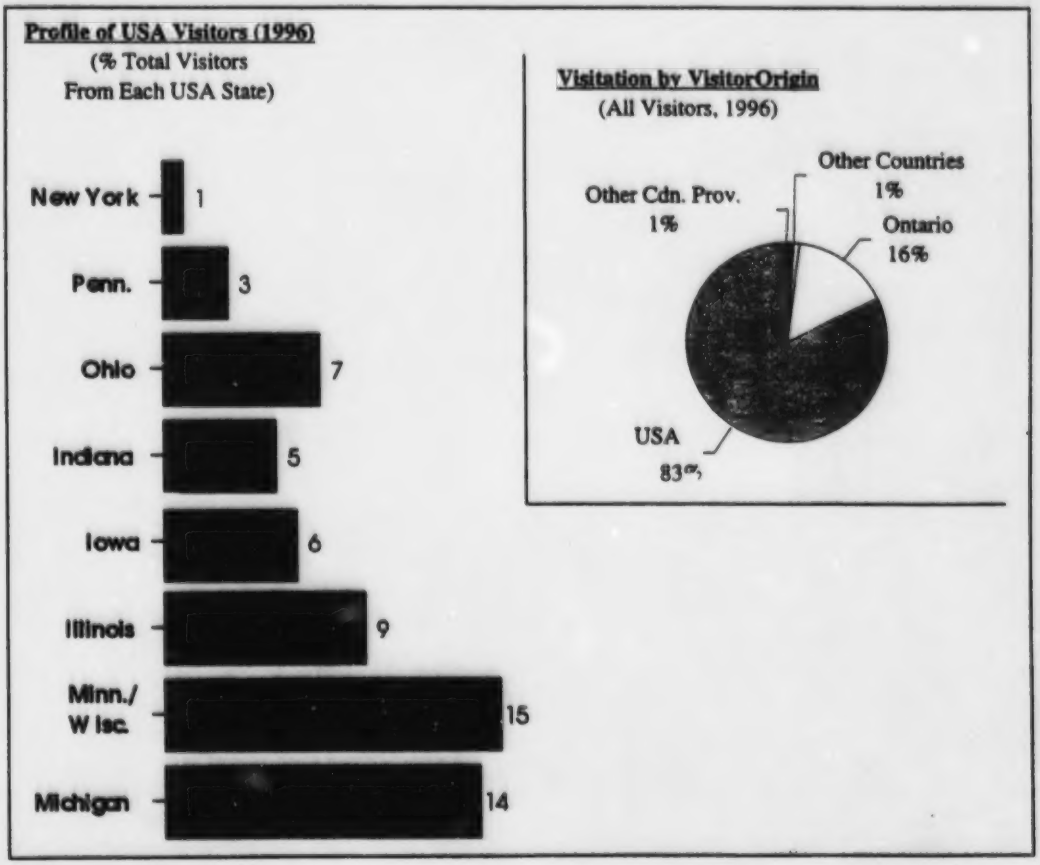
In the Southern region, Nipissing (CD 48) and Timiskaming (CD 54) had almost 10,000 visitors. Parry Sound (CD 49) and Manitoulin (CD 51) had just over 4,000 visitors.

III. MAIN FINDINGS

A) OVERVIEW OF REMOTE TOURISM IN 1996 (CONT'D.)

2. Visitation by Visitor Origin

A total of 83% of visitors resided in the United States and almost 16% resided in Ontario. Just over 62% came from the Central United States; 14% from Michigan, 15% from Minnesota and Wisconsin, 9% from Illinois, 6% from Iowa, and 5% from Indiana. Almost 18% came from the North Eastern United States; 7% from Ohio, 3 from Pennsylvania, and 1% from New York State.



USA visitation was most common in the Northwest region of Ontario (Americans representing 90% of all visitors to this region) and least common in the Northeast region (66%). Those living in Ontario represented 33% of all visitors to the Northeast region, and 28% of visitation to the South region, but only 8% of those to the Northwest region. Approximately 1% of all visitors to Northern Ontario came from another province while less than 1% came to Ontario directly from another country.

Visitation by Visitor Origin
(All Visitors, 1996)

Estimated Number of Tourists 143,080

	Total %		Total %
Canada (Net)	(16%)	USA Net	83
Eastern Canada	0.3	Central States (Net)	(62%)
Ontario	15.7	Michigan	14
Greater Toronto	2.5	Minnesota	13
Other Southern	4.6	Wisconsin	13
Eastern Ontario	0.9	Illinois	9
Northern Ontario	5.3	Indiana State	5
Unspecified Ontario	2.3	Iowa State	6
Western Canada	0.3	North Eastern States (Net)	(18%)
		Ohio	7
		Pennsylvania	3
		New York State	1
		Other North Eastern (Net)	(8%)
		Other North Western (Net)	(0.4%)
		Other South Western (Net)	(1.4%)
		Other South Eastern (Net)	(7.6%)
		Other Places in the World (Net)	(0.3%)

Visitors living in Ontario were most likely to have come from Northern Ontario, followed by Southern Ontario not including the greater Toronto area. Only 16% of Ontario based visitors stated they were from Toronto.

Visitors from the USA were most likely to have stayed in outposts (representing 93% of outpost visitors), and American plan hotels (90% of visitors). Ontario based visitors were significantly more likely than Americans to stay in motel - housekeeping and campground facilities where they represented 33% of motel - housekeeping visitors and 59% of campground visitors.

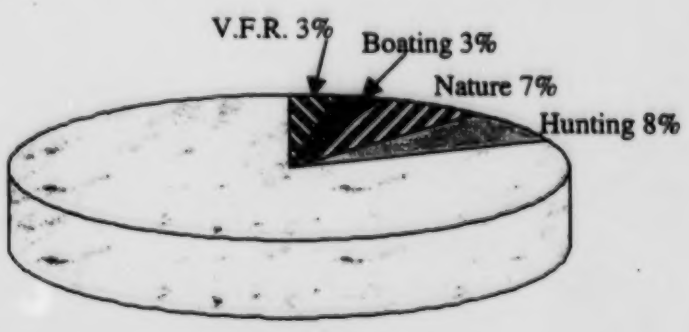
III. MAIN FINDINGS

A) OVERVIEW OF REMOTE TOURISM IN 1996 (CONT'D.)

3. Visitation by Main Purpose for Trip

The vast majority of survey respondents stated that, the main purpose for their trip to the particular remote establishment was for fishing (91%). Just over 8% identified hunting and 7% included nature or animal observation in their description of the main purpose for their trip. Only 3% identified boating, kayaking or canoeing as their main purpose for the trip, and just over 3% mentioned visiting friends or relatives[1].

Main Purpose for Trip
(All Visitors, 1996)



In total, 70% of those visitors whose main purpose was fishing, took this particular trip in the summer months (June, July and August, 1996) and 20% in the fall

[1] Note: The overlap has been reported, as given.

(mostly September, 1996). This pattern was opposite to those whose main purpose was hunting, where 77% took their trip in the fall and only 15% in the summer. Nature and animal observation trips were most likely to have occurred in the summertime (79% of these visitors). Visitors whose main purpose was for boating, were more likely than other trip type visitors to have visited in the fall (22% of all boating trips). Although the summer months were busy (75% of boating trips), springtime was not (3% of these trips).

Differences by Origin of Visitor

Residents of the United States were far more likely to have come to that remote establishment for the purposes of fishing (95% of USA visitors) than Ontario residents (67%), who were more likely to visit for hunting. One-in-four Ontario residents (25%) visiting the remote establishment came for the purposes of hunting. Similarly, Ontario residents were more likely (9%) than American residents (7%) to come to the remote establishment for nature and animal observation. Significantly more Ontario residents (7% vs. 2% for USA residents), came for kayaking, canoeing and other types of boating.

The only significant difference between the various USA residents' stating their main purpose for visiting that particular remote location, was the high proportion from Ohio, who came for nature and animal observation. In total, 14% of visitors from Ohio stated nature and animal observation was their main purpose compared to 5% of visitors from Michigan, Minnesota and Wisconsin.

Differences by Main Purpose of the Trip

Visitors from the USA represented the vast majority of all who came for fishing and nature and animal observation. Ontario residents were almost half (47%) of all visiting that establishment for the purpose of hunting. Southern Ontario (not Toronto), South Wisconsin and Iowa supplied the largest proportion of hunters to these remote Northern establishments.

Nature and animal observation was slightly more common amongst Ohio visitors than other States. Northern Ontario residents were the Canadians most likely to state that nature observation was their main purpose.

Main Purpose by Visitor Origin
(All Visitors, 1996)

	PURPOSE				
Est. # of Visitors (1996)	Hunting (12,000)	Fishing (130,000)	Nature (10,000)	Boating (3,000)	V.F.R. (4,500)
	%	%	%	%	%
Canada (Net)	47	12	20	37	36
Ontario (Net)	(47)	(12)	(20)	(37)	(29)
Toronto area	6	2	6	3	6
Other Southern	19	4	3	20	12
Eastern	3	1	1	-	-
Northern	3	4	8	13	8
Unspecified	16	1	3	2	3
USA (Net)	(52)	(88)	(79)	(63)	(61)
Michigan	14	15	10	11	12
Minnesota	9	14	10	9	7
Wisconsin	9	14	9	9	3
Illinois	4	10	11	6	2
Ohio	2	7	14	7	7
Pennsylvania	1	3	2	5	4
Indiana	-	5	6	6	2
Iowa	5	6	4	2	3
New York State	1	1	-	-	2
Other Northeastern	2	8	7	7	14
Other Southeastern	2	8	7	7	14
Other Countries					

Differences by Destination

Whereas fishing was the most common purpose for all regions in Northern Ontario, hunting and nature and animal observation varied by census district. Hunting was most common in the Northeast region, and in the following census districts:

Hunting most common in:

- Cochrane (15% of visitors)
- Sudbury (15% of visitors)
- Algoma (8% of visitors)

Within the Northwest region, Rainy River CD was almost twice as likely (11% of their visitors) to attract hunting visitors, compared to Thunder Bay and Kenora (6%). The Southern region, also had 7% of its tourists visiting for the purpose of hunting.

Nature and animal observation was also more common in the Northeast region, with between 9% to 10% of visitors identifying this as their main purpose, in these census districts. However, Parry Sound and Manitoulin had the highest share of their visitors coming for nature and animal observation (13%) and for boating (13%); particularly canoeing and kayaking.

Differences by Type of Establishment

Those tourists visiting for the purpose of hunting, were significantly more likely to stay in motel housekeeping facilities than American Plan hotels, or outpost facilities. Only 5% of visitors staying at outposts came for hunting compared to 13% of visitors to a motel-housekeeping facility.

Differences by Visitor Profile

Although only 15% of all visitors were female tourists, they were twice as likely to have identified nature and animal observation and boating as one of the main purposes of their trip and half as likely to have identified hunting. Almost half of those tourists visiting friends or relatives, were female.

Similarly, visitors under the age of 35, were significantly more likely to have identified nature observation and boating as the main purpose for their trip. Over half of those visitors whose main purpose was hunting, were between the ages of 25 and 44, with only 37% being over the age of 45. Visitors over 55 years of age were half as likely to have come for hunting.

Almost half of all visitors whose main purpose was hunting, came from Ontario, and most of these, from Southern Ontario (but not including Toronto). In fact, one-in-three visitors from Southern Ontario stated their main purpose was hunting. Southern Ontario residents also represented a large proportion (20% of visitors), whose main purpose was boating.

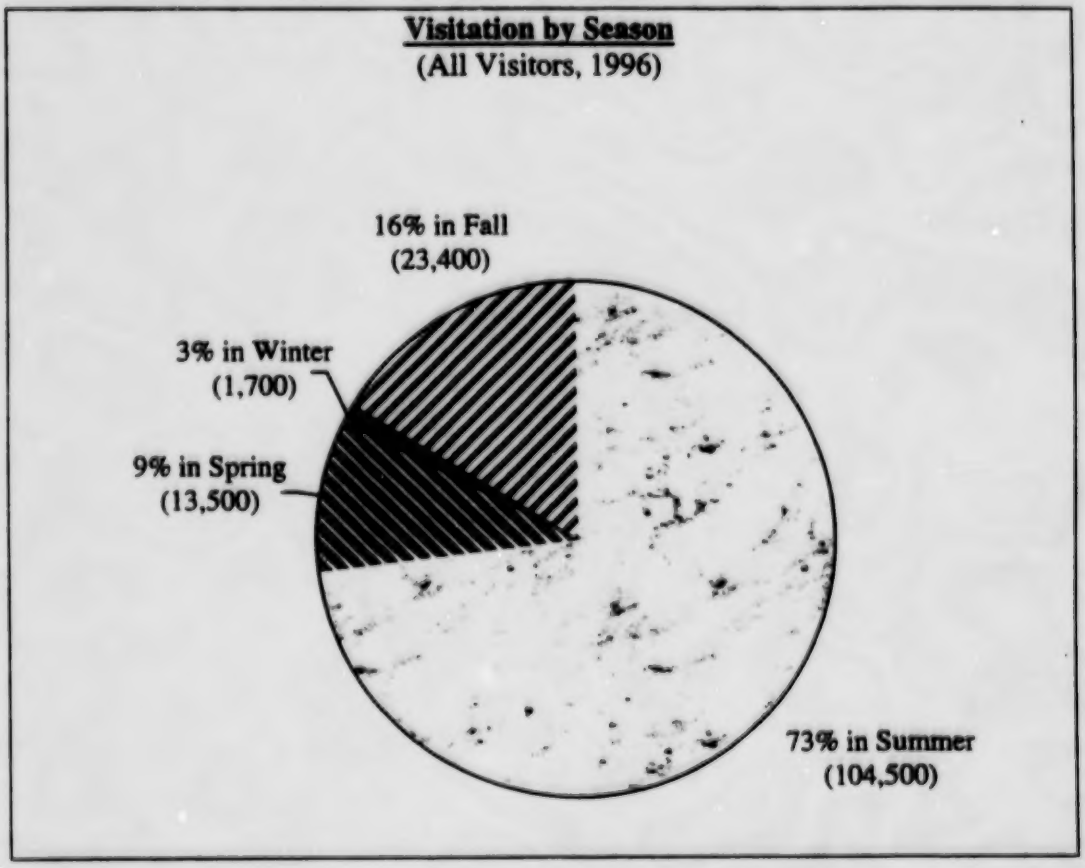
Visitors from the USA, who came for the hunting, were most likely to have come from Michigan, particularly Southeast Michigan. However, visitors from Central Minnesota, Southern Wisconsin and Iowa, also represented a higher than average proportion of USA hunters. There did not appear to be a pattern identifying the residency of higher than average nature and animal observational visitors, with the exception of visitors from the Greater Toronto area. Visitors from Toronto were twice as likely to have identified nature observation as being their main purpose, compared to other Ontario residents.

III. MAIN FINDINGS

A) OVERVIEW OF REMOTE TOURISM IN 1996 (CONT'D.)

4. Visitation by Season

Overall, approximately 73% of visitation to remote northern tourism establishments in 1996 came in the summer months of June, July and August.



It should be noted, the poor weather during many months of this year was thought to have reduced the overall level of visitation. In the summer of 1996, questionnaire response rates reflected a particularly weak July and below average

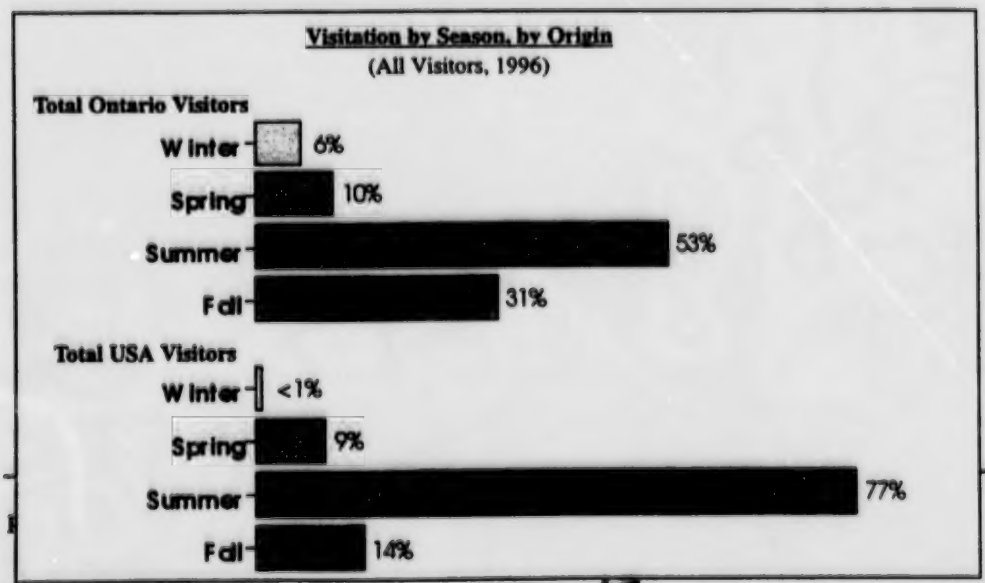
August visitation incidence, with June being the busiest month. The summer response levels to the questionnaire accurately reflected actual visitor incidence levels gathered by operators during the summer months.

The seasonal pattern was consistent through all regions, with the Northeast having proportionately the most wintertime visitors.

Visitation by Season/by Region (1996)

	Total	Northwest Region	Northeast Region	Southern Region
Total Est. # of Visitors	143,080	93,400	35,600	14,000
By Season:				
Winter	1,700	800	800	37
Spring	13,500	8,400	4,400	800
Summer	104,500	59,500	24,000	11,300
Fall	23,400	14,700	6,800	1,900

Canadian visitors to Northern Ontario were virtually all from Ontario, and these visitors were significantly more likely than American visitors, to visit a remote establishment throughout the year. Approximately 77% of American visitors, came in the summer months and 14% in the fall, while 53% (of Canadian visitors) came in the summer and almost one-third (32%) visited in the fall.



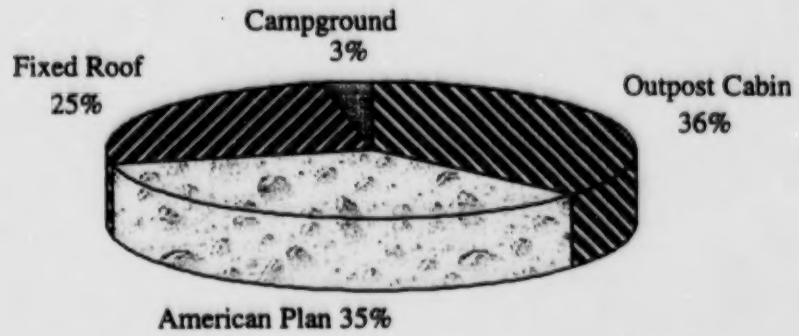
III. MAIN FINDINGS

A) OVERVIEW OF REMOTE TOURISM IN 1996 (CONT'D.)

5. Type of Establishment

Overall, approximately one-third (36%) stayed in an outpost cabin for the most number of nights at that establishment. Almost as many (35%) stayed in a fixed roof accommodation, with a restaurant offering an American plan. Approximately one-in-four (25%) stayed in a fixed roof accommodation without a restaurant but with a kitchen. Very few, stayed in campground[1] facilities (3%).

Type of Establishment Stayed at Most
(All Visitors, 1996)



Visitors to the Northwest region were more likely to have stayed in an outpost cabin (44% of visitors), whereas visitors to the south region were more likely to have stayed in fixed roof accommodation facilities, offering an American plan (43%). The Northeast region had the smallest number of visitors staying at an

[1] A 'campground' is defined by MEDTT as *"a tourist establishment consisting of at least 5 campsites and comprising land used or maintained as grounds for ... camping or ... tents used for recreational purposes"*.

outpost cabin (17%) and the most staying at a fixed roof accommodation without a restaurant, but with a kitchen (43%).

The Northeast region had the least consistency in type of facility used by visitors; with 35% in the Sudbury district visitors staying in outpost cabins, compared to 8% in Algoma; where 60% stayed in fixed roof accommodation with a restaurant offering an American Plan. Similarly, in the Cochrane Census District, approximately 66% of visitors stayed at fixed roof accommodation; without a restaurant, but with a kitchen.

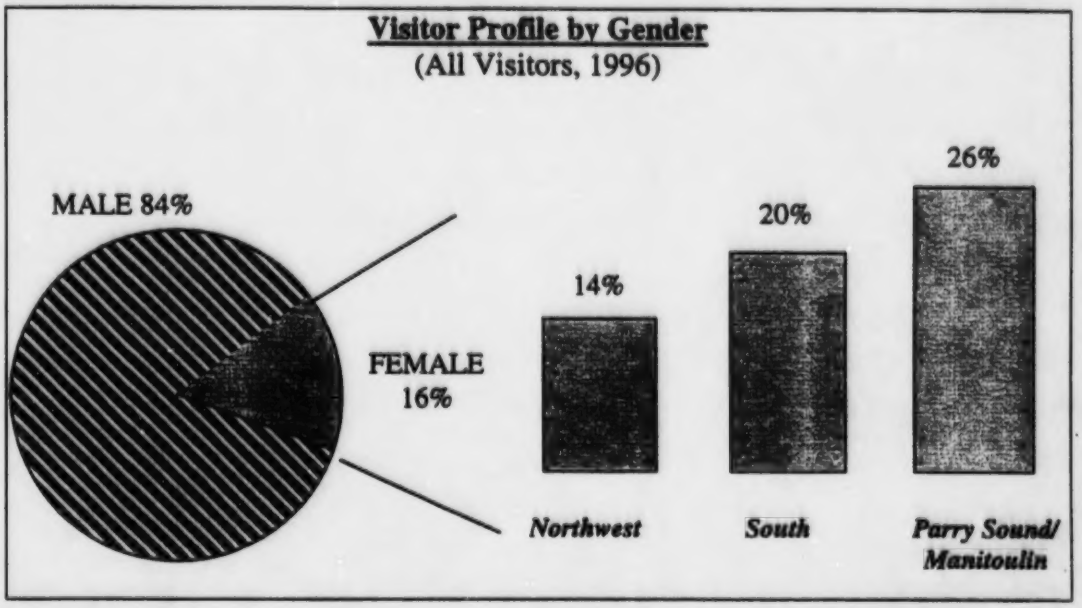
III. MAIN FINDINGS

B) VISITOR PROFILE

1. Visitor Demographics

Gender

Overall the vast majority (84%) of all visitors were male, with an average age of 46 years. The incidence of female visitors was lowest in the Northwest region (14%) and highest in the South region (20%). The census district with the highest proportion of female visitation was Parry Sound/Manotulin (at 26%).



The female visitors were less likely to stay in outposts, where they made up 6% of outpost visitors. They were more likely to stay in campground facilities, where they made up 34% of the campground visitors (however, only about 3% of all visitors went to 'campgrounds'). And they made up a larger proportion (21%) of Canadian visitors, vs. only 14% of USA visitors.

Age

Just over half (53%) of all visitors staying at these remote locations, were between the ages 35 and 54, with the average age of all visitors being 46 years old. Approximately 20% of visitors were between the ages of 18 and 34, while 27% were, 55 years of age, or older. In general, the average age of adult visitors varied little by destination region, or by type of establishment.

American visitors tended to be older than Ontario visitors (47 years vs. 42 years average, respectively). As well, there was twice the average number of visitors over 55 years from the USA.

Income

The average estimated household income for all visitors was $68,000 (Cdn. dollars). Those visitors from Ontario averaged $62,000, while USA residents averaged $69,000. Visitors from Western and Southeastern USA averaged the highest annual income ($76,000 and $82,000 respectively).

Visitors coming for the fishing experience, have a slightly higher average income than hunters ($68,000 vs. $62,000 respectively). Those staying in outposts and American Plan hotels, also had a higher than average income ($71,000 per year for both).

Occupation

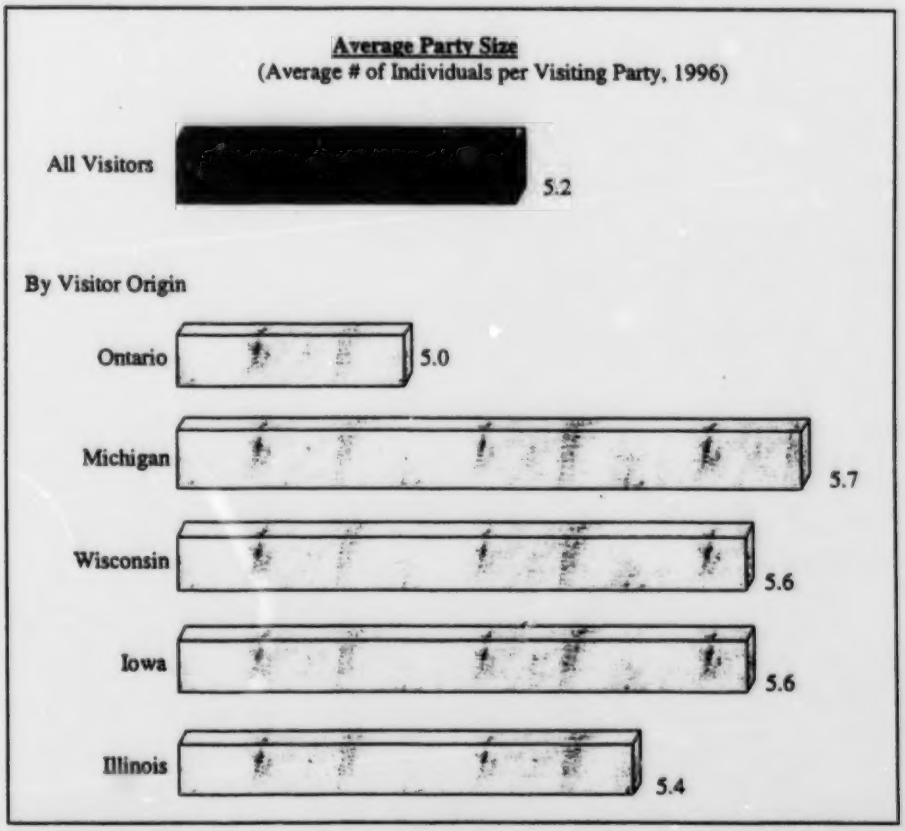
Almost half of all visitors (44%) held managerial or professional positions; 45% of USA visitors and 35% of Ontario residents. Those visitors coming for hunting, were less likely to be managerial/professionals (34%) and more blue collar (21%) than those coming for fishing (44% and 17% respectively).

III. MAIN FINDINGS

B) VISITOR PROFILE (CONT'D.)

2. Party Size

Overall, visitors to these remote establishments rarely came in small groups. There was an average of 5.2 individuals (4.8 of whom were adults, over 18 years of age) in each party visiting the remote establishment. This represented a total of approximately 30,000 parties visiting remote establishments in Northern Ontario. There were slightly fewer per party (5.0), when the visitors originated from Ontario. The largest party sizes came from Michigan (5.7), Wisconsin (5.6), Iowa (5.6), and Illinois (5.4).



Of all parties, 81% were made up of adults only and 19% included children. Parties with children brought an average of 2.5 children (1.8 of whom were their children). Ontario residents who brought children to the remote establishment (22%) brought an average of 2.8 children.

Overall, most visitors (58%) came on the trip with other adult friends only. A total of almost 23% came with other members of their family only, while 17% came with family plus another family, friends or relatives. Only 1% came alone. Children were more likely to have come with Ontario visitors (1.1 children per family) compared to USA visitors (0.7 visitors).

The South region of Northern Ontario, particularly Parry Sound and Manitoulin, were the destinations with the most 'family only' visitors. The Northwest region, particularly Rainy River, was most likely to have visitors who came with only 'other adult' friends. Children were most likely to have come with visitors to the Southern region and least likely to have come with visitors to the Northwest.

In total, only 2% of all visitors stated they were part of a tour group. The South region appeared to have the least number of tour groups (1%) and the Northeast region, the most (3%). Tour groups were slightly more common amongst Canadian visitors (3%), than amongst American visitors (2%).

In general, when visitors came with other adult friends only, the average party size was 5.3 persons per group. However, when they came with family members (only), the average party size decreased significantly to 3 individuals per group, which included an average of 0.7 children (under 18 years of age).

Party sizes from the United States were slightly larger than those from Canada. USA visitors who came with adult friends only, averaged 5.3 individuals per group compared to 4.9 for Ontario residents. Similarly, visitors from the USA who came with members of family only, averaged 3.1 individuals per party compared to 2.7

for Ontario residents. USA residents were approximately one-third less likely to bring children.

When visitors came with both adult friends and family relatives, they averaged 2.8 family adults and 3.1 non-family adults. There were few differences between Americans and Canadians on this issue.

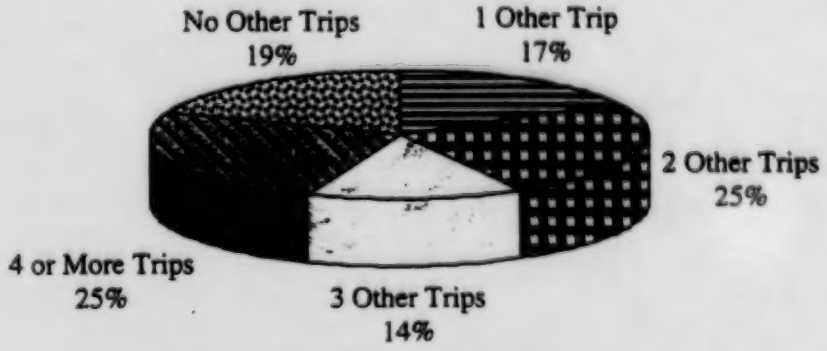
III. MAIN FINDINGS

B) VISITOR PROFILE (CONT'D.)

3. Frequency of Trips

In the past 24 months the average visitor to remote establishments in Northern Ontario had taken an average of 2.9 trips to remote locations (anywhere in the world), so they could engage in activities such as hunting, fishing and nature observation. Only one-in-five visitors (19%) had not taken another trip in the past 24 months. Almost 17% took only one other trip in the past two years, whereas one-in-four visitors (25%) had taken two other trips. Approximately 25% appeared to be active remote tourists, having taken four or more trips, in the past two years.

Average Number of Trips to Remote Locations Anywhere in the World (In Past 2 Years)



All Visitors (1996)

On average, approximately 1.2 of the 2.9 trips taken anywhere, were taken to the current remote Northern Ontario location and an average of 0.6 trips taken to other remote locations in Ontario. On average, visitors had also been to 0.9 other locations in the United States and had taken, on average, 0.2 trips to other remote locations in the world.

Overall, approximately 65% of all visitors (both residents of Ontario and the USA) had taken other trips to these same remote locations in Northern Ontario in the past two years. Almost 30% had taken at least one trip to another remote location in Ontario, 11% to remote locations in the rest of Canada. Almost 43% of visitors had gone to other remote locations in the United States in the past two years. Approximately 9% of all visitors stated they had been to other remote locations somewhere in the rest of the world, in the past two years.

Differences by Origin of Visitor

On average, visitors from the USA averaged 1.4 remote trips in Ontario in the past two years compared to 3.5 for Ontario residents. One-third of American visitors (33%) had taken no other trips to a remote location in Ontario in the past two years, compared to 22% of Ontario residents. However, only 19% of American visitors had taken no other trips to any other remote destination anywhere in the world compared to just over 18% of Ontario resident visitors. Nevertheless, on average, Ontario residents averaged 3.9 remote trips anywhere in the world, in the past two years compared to 2.8 for American residents.

Both American residents and Ontario residents had the same return rate (to that particular location); just over 50%. However, Ontario residents were twice as likely as American residents to have taken more than one other trip to this particular remote location; an average of 2.1 trips from Ontario visitors and 1.0 trips for American visitors. This pattern was particularly obvious among those who had taken four or more trips in the past two years (11% Ontario residents and

2% for residents of the USA). As well, American residents were less likely to have visited other remote locations in Ontario.

There was little difference between American residents of the Northeast USA and Central USA on their average number of visits to the particular remote location where they completed the survey.

Differences by Destination

Visitors to Ontario's Northeast region, particularly those to the Sudbury CD, were most likely to have visited their remote facilities more frequently in the past two years. Almost 13% of visitors to the Sudbury region had taken four or more trips. The average for the Northeast region was 1.5 trips in the past two years, with only Algoma reflecting the provincial average of just over one trip.

Differences by Type of Establishment

Those visitors using motel-housekeeping facilities and campgrounds were more likely to have taken at least two or more trips, in the past 24 months. Outpost visitors and American Plan hotel visitors averaged less than one trip in the past two years.

III. MAIN FINDINGS

C. VISITOR ATTITUDES

In the survey, three broad issues were investigated on the topic of, visitor's attitudes to their experience on this trip to that particular remote location in Northern Ontario. Visitors were asked to evaluate:

1. Specific issues related to their experience at the establishment compared to other remote establishments.
2. Their overall level of satisfaction with the experience.
3. The impact of, logging and mining operations they might have encountered during their visit.

Each individual responding to the survey answered questions specific to the location they were visiting. These experiences and attitudes were computer tabulated and then reported in aggregate, so as to profile regions at the census district (CD) level. The following section describes these attitudes in total, by census district and by respondent profile.

First, visitors were asked to describe how important a variety of attributes were in driving their decision to go to that establishment. Visitors were then asked to compare their stay at that particular establishment with other experiences they might have had at other remote establishments. They were asked, if they had not had any comparable experiences (first time remote travellers), to answer based on whatever they had seen, heard or read

III. MAIN FINDINGS

C. VISITOR ATTITUDES (CONT'D.)

1. Importance of Attributes

Overall, the three most important reasons visitors identified (stated) as driving their decision to come to that particular destination, were the following:

1. The quality of the fishing (or hunting, as relevant) experience.
2. The quality of the service they receive from the establishment.
3. The tranquillity and absence of people.

The following table describes the relative "stated" importance of specific reasons at driving their initial interest in visiting this remote establishment.

Relative Importance—By Origin of Visitor

(Score where 10 = extremely important; 5 = fairly important; 0 = not at all important)	Importance of Attribute: Ontario Residents	U.S.A. Residents
A) The Facility		
i) The convenience of getting to the facility	4.5	4.3
ii) The quality of the food at the facility	4.1	4.3
iii) The quality of the accommodation	6.6	6.4
iv) The quality of the service	6.9	7.2
B) The Experience		
i) Quality of the fishing experience	6.5	8.4
ii) Quality of the hunting experience	5.6	3.0
iii) Opportunities to see wildlife	5.3	5.2
iv) Availability of other activities	4.2	2.3
C) The Environment		
i) Views and scenery	6.2	6.2
ii) The untouched nature of the forest	6.5	6.6
iii) The tranquillity/absence of other people	6.7	7.1
iv) The absence of troublesome insects	4.2	4.2
D) The Cost		
The financial cost of the overall experience	6.0	5.6

The quality of the fishing experience was slightly more important to visitors to the Northwest region than visitors to the South and Northeast (mean scores of 8.3 vs. 7.8 and 7.8 respectively). Fishing was also more important to those staying at outposts (mean score of 8.7 vs. the average mean of 8.1).

The quality of the service was rated as being slightly more important to visitors to the Southern region (mean score of 7.6) compared to the Northeast (6.7) and the Northwest (7.2). It was also more important to those visitors whose purpose included nature and animal observation (7.7 vs. only hunting and fishing visitors at 7.2).

In general, the financial cost of the experience was most important to visitors to the Southeastern region and the Sudbury CD (mean score 6.3 for both). It was much more important for those staying in campgrounds (mean score 7.6) and slightly more important to hunters and boaters than fishermen (mean scores 6.0, 6.4 vs. 5.6 respectively).

Interestingly, those who were most satisfied with their experience rated most considerations as being slightly more important than those who were less satisfied.

	% Stating Each Consideration "Extremely Important"		
Stated level of Overall Satisfaction:	Financial Cost	Quality of Fishing	Quality of Service
Extremely satisfied	26	57	54
Very satisfied	19	49	31
Fairly satisfied	15	44	16

For those who stated in American Plan hotels, the quality of the food and service is most important. For those who stayed in motel/housekeeping establishments, the convenience of getting there and the hunting were most important. Those staying in outpost cabins rated the tranquillity and absence of other people as most important.

Relative Importance—By Type of Establishment

(Score where 10 = extremely important; 5 = fairly important; 0 = not at all important)	TYPE OF ESTABLISHMENT		
	American Plan	Motel/ Housekeeping	Outpost
A) The Facility			
i) The convenience of getting to the facility	4.4	5.2	4.3
ii) The quality of the food at the facility	5.2	3.4	3.9
iii) The quality of the accommodation	6.6	6.4	6.1
iv) The quality of the service	7.3	6.8	7.2
B) The Experience			
i) Quality of the fishing experience	8.0	7.3	8.1
ii) Quality of the hunting experience	2.9	4.1	3.6
iii) Opportunities to see wildlife	5.1	5.4	5.3
iv) Availability of other activities	2.3	3.1	2.2
C) The Environment			
i) Views and scenery	6.1	6.4	6.2
ii) The untouched nature of the forest	6.1	6.4	7.0
iii) The tranquillity/absence of other people	6.5	6.5	7.9
iv) The absence of troublesome insects	4.3	4.2	4.1
D) The Cost			
The financial cost of the overall experience	5.6	5.7	5.4

III. MAIN FINDINGS

C. VISITOR ATTITUDES (CONT'D.)

2. Comparison to Other Remote Establishments

When the visitor was asked to compare the quality of the experience at this particular establishment, with that of other remote establishments they might have visited, Northern Ontario establishments were compared most favourably on *the quality of the service at the facility* issue.

Overall Comparison with Other Remote Establishments

Scale where 10 = Much better; 5 = About the same; 0 = Much worse	Northern Ontario's Average Rating	
	Ontario Residents	USA Residents
A) The Facility		
i) The convenience of getting to the facility	6.7	6.9
ii) The quality of the food at the facility	7.6	7.9
iii) The quality of the accommodation	7.8	7.8
iv) The quality of the service	8.1	8.4
B) The Experience		
i) Quality of the fishing experience	7.1	7.6
ii) Quality of the hunting experience	7.1	6.6
iii) Opportunities to see wildlife	7.0	6.9
iv) Availability of other activities	6.8	6.0
C) The Environment		
i) Views and scenery	7.7	7.6
ii) The untouched nature of the forest	7.4	7.4
iii) The tranquillity/absence of other people	7.4	7.5
iv) The absence of troublesome insects	5.9	5.5
D) The Cost		
The financial cost of the overall experience	6.6	6.2

Comparatively, American Plan establishments scored well on the quality of the service and quality of the food, both of these attributes being relatively important to this type of establishment. Motel/housekeeping establishments were rated best on their service, quality of the accommodation and views and scenery. Outposts rated particularly well on the tranquillity, absence of other people, the quality of the fishing experience and overall level of service.

Comparison with Other Remote Establishments[1]
(By All Staying at Each Type of Establishment)

Scale where 10 = Much better; 5 = About the same; 0 = Much worse	AVERAGE RATING FOR EACH TYPE OF ESTABLISHMENT		
	American Plan	Motel/ House-keeping	Outpost
A) The Facility			
i) The convenience of getting to the facility	7.2	6.4	6.8
ii) The quality of the food at the facility	8.5	7.4	7.3
iii) The quality of the accommodation	8.1	7.8	7.4
iv) The quality of the service	8.7	8.1	8.2
B) The Experience			
i) Quality of the fishing experience	7.4	7.4	7.8
ii) Quality of the hunting experience	6.8	7.0	6.6
iii) Opportunities to see wildlife	6.9	7.1	6.8
iv) Availability of other activities	6.2	6.3	5.8
C) The Environment			
i) Views and scenery	7.7	7.7	7.4
ii) The untouched nature of the forest	7.5	7.5	7.3
iii) The tranquillity/absence of other people	7.2	7.3	7.8
iv) The absence of troublesome insects	5.7	5.7	5.4
D) The Cost			
The financial cost of the overall experience	6.3	6.5	5.9

[1] The number of campground responses to this question was too low to be reported.

The comparative ratings given by visitors to establishments in each region of Ontario, were as follows:

Comparison with Other Remote Establishments
(By All Staying in Each Region)

Scale where 10 = Much better 5 = About the same 0 = Much worse	AVERAGE RATING FOR EACH REGION		
	Northwest	Northeast	South
A) The Facility			
i) The convenience of getting to the facility	6.8	6.9	7.0
ii) The quality of the food at the facility	7.8	7.8	8.1
iii) The quality of the accommodation	7.9	7.6	7.9
iv) The quality of the service	8.4	8.2	8.6
B) The Experience			
i) Quality of the fishing experience	7.7	7.3	6.9
ii) Quality of the hunting experience	6.7	6.7	7.1
iii) Opportunities to see wildlife	6.9	6.8	6.9
iv) Availability of other activities	5.9	6.4	6.4
C) The Environment			
i) Views and scenery	7.5	7.6	7.9
ii) The untouched nature of the forest	7.5	7.5	7.3
iii) The tranquillity/absence of other people	7.5	7.3	7.5
iv) The absence of troublesome insects	5.7	5.5	5.6
D) The Cost			
The financial cost of the overall experience	6.2	6.3	6.7

Overall, average ratings between regions were comparatively similar. The Northeast region had slightly lower scores for the quality of the accommodation and service. The quality of fishing experience was seen as better in the Northwest, however, this region also had the lowest availability of other activities. The South rated best for the quality of its hunting experiences, quality of the food and financial cost of the overall experience.

III. MAIN FINDINGS

C. VISITOR ATTITUDES (CONT'D.)

3. Satisfaction with the Experience

Overall, the vast majority (87%) of all visitors stated they were satisfied - either "extremely" (44%) or "very satisfied" (43%), with their experience at the remote establishment in Northern Ontario. Just over 1% (1.2%) stated they were not satisfied.

Visitors who were resident in Ontario, were slightly more likely to be extremely satisfied (48%) with their experience, compared to U.S.A. residents (43%). American residents, from Illinois and Western U.S.A., were the most satisfied with their experience and those from Iowa and Indiana and the Southeast, least satisfied.

Difference by Destination

The census districts which contained the establishments with the highest level of overall satisfaction, in descending order, were,

Beginning with most satisfied visitors:	**Proportion of Visitors Stating Extremely Satisfied with Their Stay**
Parry Sound and Manitoulin (CD 49/51)	59%
Kenora (CD 60)	50%
Sudbury (CD 52)	50%

The census district with the lowest level of visitors stating they were extremely satisfied with their overall experience, in order, were:

Beginning with least satisfied visitors:	Proportion of Visitors Stating Extremely Satisfied with Their Stay
Thunder Bay (CD 58)	29%
Rainy River (CD 59)	39%

It appeared that Nipissing/Timiskaming had the most number of visitors (6%) stating they were not very satisfied with their experience. It has been estimated that some 550 remote tourists to this region were not satisfied enough with their experience in 1996.

Differences by Types of Establishment

There is very little difference in overall level of satisfaction between visitors who stayed at different types of establishments on their trip. The level of satisfaction for American plan hotels (47% extremely satisfied) was only slightly higher then those who stayed at outposts (41% extremely satisfied). However, those staying at outposts were significantly more likely not to be satisfied with their experience (2% vs. less than 1% for other types of establishments).

Differences by Main Purpose

Those visitors whose main purpose for their trip was either hunting, boating or nature observation had the highest level of satisfaction with their experience at the remote establishment (56–57% extremely satisfied). The level of satisfaction for those whose purpose was fishing was closer to the average (43% extremely satisfied). There was no observable pattern amongst those few who were not satisfied.

III. MAIN FINDINGS

C. VISITOR ATTITUDES (CONT'D.)

4. Likelihood of Returning

Overall, the proportion who stated they would definitely return to that particular remote establishment in the next two years was 47% of all visitors. This likelihood of returning was closely related to their overall level of satisfaction.

In fact:

- 70% of those extremely satisfied, would definitely return;
- 35% of those very satisfied, would definitely return; and
- Only 14% of those moderately, or less satisfied, would definitely return.

Residents of the United States were less likely to definitely return (46%) than residents of Ontario (57%). However, over 43% of visitors from each American State definitely stated they would return within two years. There was little difference between States, Indiana being the American origin with the highest likelihood of definitely returning (51%).

Differences by Destination

The census districts with the highest likelihood of having return visitors to their remote establishments in the next two years were:

Regions with Visitors Most Likely to Return	**Proportion Stating Definitely Will Return**
Sudbury (CD 52)	58%
Cochrane (CD 56)	52%
Kenora (CD 60)	50%
Nipissing/Timiskaming (CD 48/54)	50%
Parry Sound/Manitoulin (CD49/51)	49%

The CD regions with the least likelihood were (albeit still substantial):

Regions with Visitors Least Likely to Return	Proportion Stating: Least Likely to Return
Rainy River (CD 59)	41%
Algoma (CD 57)	43%
Thunder Bay (CD 58)	43%

Differences by Main Purpose

Those visitors whose main purpose was either hunting or boating expressed the most likelihood of returning to the same remote establishment. Their level of definite likelihood (57% and 55% respectively) was higher than the average for fishing (47%) and nature and animal observation (50%).

Reasons for Likelihood of Returning

Those respondents to the survey who stated they were not likely to return (those who said they may or may not, probably will not or definitely will not return) gave the following reasons for their decision not to return:

Reasons for not returning	Proportion Stating Not Very Likely to Return
Prefer different locations for each trip	36%
Experience did not live up to expectations	15%
Facilities at this establishment were poor	4%
Environment of location did not live up to expectations	4%
Did not receive good value for the money	3%

Note: There were a wide variety of "other" mentions (28%).

Although U.S. residents were less likely to return (16%) than Ontario residents (9%) their reasons for not returning were the same, except for one issue. Ontario residents were more likely to complain the facilities at the establishment were poor (12%) compared to American residents (3%). Those staying at outposts were least likely to return to that location (20%) and were most likely to state that the environment of the location did not live up to expectations (5% of all reasons given for not returning) and that they did not receive good value for their money (also 5%).

Likelihood of Recommending Establishment to Others

Overall, three out of four (75%) of all visitors stated they would definitely recommend the northern establishment to their friend or colleague. Only 1.4% stated they probably would not recommend it. Ontario residents were marginally more likely (79%) to recommend the establishment than residents of the U.S.A. (75%).

Virtually all of those who would probably or definitely not recommend it (1.5%) were residents of the U.S.A. Those U.S. residents living farther away from Ontario (Western and Southeastern U.S.A.) were slightly less likely to recommend it, as were the few international visitors who responded.

Closer to Ontario, U.S.A. residents in Wisconsin and Ohio were slightly less likely than Illinois visitors to recommend it (71% for both vs. 80% for Illinois). As well, those visiting primarily for the purpose of hunting or, nature and observation (82% and 86% respectively) were more likely to definitely recommend the location, than were those whose purpose was fishing (75%).

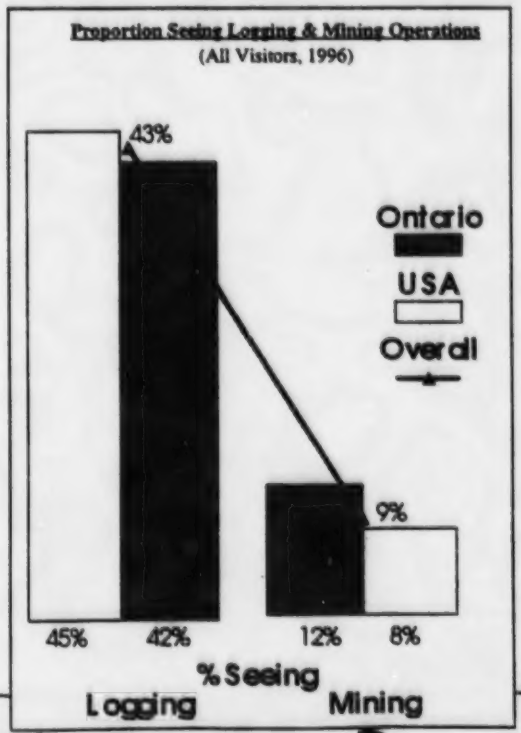
III. MAIN FINDINGS

D. THE LOGGING AND MINING ISSUE

1. Indications of Logging & Mining Operations

Visitors to northern remote tourism establishments were asked whether, on this trip, they had seen or heard any indications of logging or mining operations. If they had, they were asked what they had seen or heard. Finally, they were asked to what extent the logging and mining activity had affected their interest in returning to this location.

In total, 43% of all visitors had seen some indication of logging operations, primarily clear-cut forestry (31%) and access roads (25%). Indications of logging were seen almost five times more frequently than indications of mining. A total of 9% had seen some indication of mining operations; 3% had seen pit or strip mining; 3% machinery and, 3% access roads. Noise from logging affected 5% of all visitors, whereas noise from mining affected less than 1%.



Proportion Seeing Logging or Mining Operations By Main Purpose of Trip (All Visitors, 1996)		
Main Purpose:	Logging	Mining
Hunting	63%	10%
Fishing	42%	9%
Nature & Animal Observation	44%	10%
Boating	36%	2%

Those visitors coming for hunting were most likely to have seen indications of logging. They were most likely to see all forms of logging operations, with over one-in-three seeing clear cut forestry and forest access roads.

Indications of logging were more common in the Northeast region and less common in the south region. In particular, the census district destinations with the highest level of logging and mining were:

Regions with Highest Levels of Operations	% Seeing Logging	% Seeing Mining
Sudbury (CD 52)	50%	18%
Algoma (CD 57)	44%	12%

The south region particularly had the lowest indication of logging and mining (16% and 3% respectively).

Indications of Logging/Mining Operations by Destination
(All Visitors, 1996)

	NORTHWEST			NORTHEAST			SOUTHERN	
% Seeing each	T. Bay	R.R.	Kenora	Sudbury	Cochrane	Algoma	Nip./ Tim.	Parry/ Man.
	%	%	%	%	%	%	%	%
LOGGING (NET)	49	47	39	50	48	44	36	16
Clear cut forestry	41	38	29	31	34	31	23	3
Selected tree cut	12	16	11	8	17	13	5	6
Forest access roads	29	28	22	25	29	26	21	9
Logging noise	3	3	4	18	6	4	10	3
Logs in lake	5	6	4	7	5	5	5	1
MINING (NET)	5	8	10	18	5	12	9	3
Pit or strip mining	1	1	5	1	2	7	4	2
Machinery	2	4	2	9	2	3	3	2
Mining access roads	3	3	5	6	2	4	4	-
Mining noise	1	1	1	-	-	-	-	-
Slag tailings	1	1	2	3	1	4	1	-

III. MAIN FINDINGS

D. THE LOGGING AND MINING ISSUE (Cont'd)

2. Impact of These Operations

Approximately 21% of all visitors and half (50%) of those seeing these operations, stated that there was some negative impact from logging operations on their interest in returning to the location (over 30,000 visitors in total).

Almost 3% of all visitors and 6% of those seeing these operations, (2.7% or 4,000 visitors) stated that indications of logging were one of the main reasons why they would not return. Almost 3% of all visitors (an estimated 3,100 visitors) and 7% of those seeing these operations, stated that indications of mining had some negative effect on their interest of returning.

Overall, residents of Ontario and residents of the U.S.A. had similar experiences seeing or hearing logging (45% and 42% respectively) and mining (12% and 9% respectively) respectively. However, U.S. residents were more likely than Ontario residents, to state that mining and logging activity would have a negative impact on their likelihood of returning: 22% of U.S. residents compared to 16% for Ontario residents being less interested because of seeing logging activities and 3% vs. 1% for mining activities.

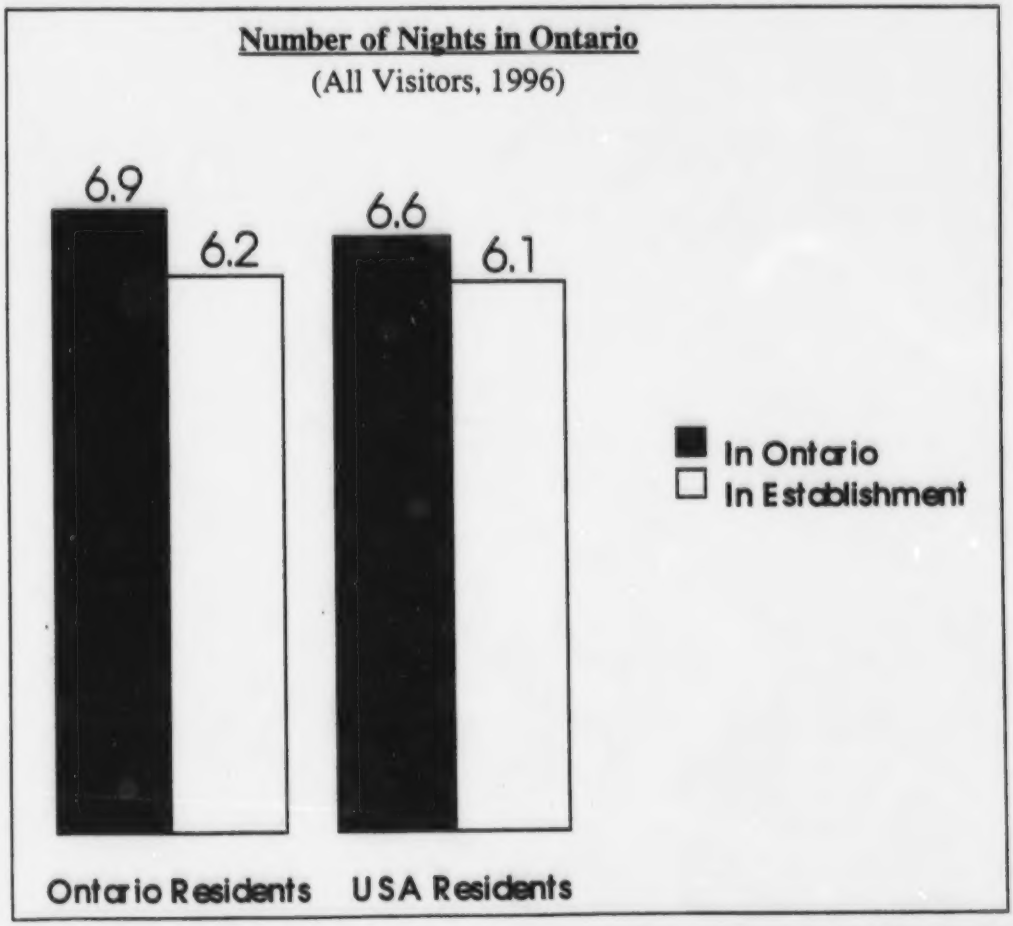
III. MAIN FINDINGS

E. PROFILE OF TRIP

1. Travel Patterns

Duration

In general, remote establishment visitors stayed about a week (7 nights) in Ontario on their trip with six (6) of those nights being in that remote establishment. There was little variation on this pattern, with more than half of these visitors staying either 6, 7, or 8 nights in Ontario, less than 10% staying for less than 3 nights and less than 10% who stayed for 2 weeks or longer.



USA visitors were more likely to have stopped overnight in Ontario in a place other than the remote establishment; 29% stating they had done so compared to 10% of Ontario visitors. Virtually all visitors stayed one night prior to their stay at the establishment. Only 5% stated they stayed in other places in Ontario on the return trip (7% of Ontario residents), usually only one night.

In general, visitors stayed an average of one day longer in the Northeast region and one day less in the Kenora CD. Visitors stayed one day longer for hunting and boating, and one day longer in Motel/housekeeping facilities.

Overnight Stops

Those visitors staying in other locations prior to their stay at the establishment were most likely to stay in the Northeast region and least likely to stay in the Southern region.

Other Locations Stayed At
(All Visitors, 1996)

		PROPORTION STAYING IN EACH LOCATION			
		BEFORE		AFTER	
	Residents of:	Ontario	USA	Ontario	USA
Location Stayed At:		%	%	%	%
Region:	Kenora	-	6	-	1
	Rainy River	-	3	-	-
	Thunder Bay	1	5	-	1
	Cochrane	4	1	-	-
	Algoma	3	8	1	2
	Sudbury	1	2	2	-
	Timiskaming	-	1	1	-
	Nipissing	2	1	-	-
	Parry Sound	-	-	-	-
	Other Southern	1	1	2	1
	Other Northern	1	3	1	1

Transport

Overall, most visitors (59%) reported arriving at the remote establishment by their own private car. Another 4% arrived by rented car, making road transport the most common means of getting to remote establishments. Of course, this may well have meant getting to a start-off point, after which the establishment used its own transport to take the visitors to some remote facilities.

Approximately one-in-four (26%) reported arriving at the establishment by the establishment's own plane or boat.

There were some differences by origin of visitor.

Transport Used
(All Visitors, 1996)

	Origin of Visitor	
	Ontario	USA
Transport used to arrive/depart:	%	%
Own Car	66	57
Rented Car	1	4
Own boat/plane	3	3
Public boat/train	3	-
Establishment plane or boat	11	29

The regions with the highest usage of the establishments' own plane were:

Region Visited	% Using Establishment Plane/Boat
Algoma	39%
Rainy River	28%
Kenora	28%

III. MAIN FINDINGS

E. PROFILE OF TRIP (Cont'd)

2. Expenditures

Although almost all the visitors travelled in parties, these parties were often made up of adult friends. Reporting just on the money they personally spent (including children, if appropriate), the visitors reported spending an average $1,031.

However, a little over one-in-four (28%) additionally had a prepaid package with their remote establishment, and the average cost for this was $870. In total, therefore, the average spending within Ontario for their Northern trip was $1,282. (This amount does not include travel costs outside Ontario, or on foreign airlines.)

The prepaid package almost always (86%) included accommodation, and usually (64%) transportation and meals (44%). Fishing licenses and guide services were included on a less common basis (27% and 16% respectively).

In general, accommodation accounted for a little over a third (38%) of their expenditures, mostly at the resort itself (32%) rather than before or after the trip (6%). Transportation in total accounted for 16% and food/beverages for 17%. There was a greater 'spill-over' effect for food expenditures, 8% away from the destination resort as opposed to 9% at the resort.

The total amount spent was notably higher for American visitors: $1,371 vs. $809 for Canadian visitors. Amounts were much higher at outposts ($1,516) and at American Plan/Hotel accommodations ($1,362); these were establishments where Americans were more likely to go. Amounts were also higher in summer ($1,337) than in the shoulder seasons, and much higher than the few travellers coming in winter $662).

III. MAIN FINDINGS

F. Economic Impact

1. Overview

Tourists visiting remote tourism establishments in Northern Ontario spent $183.4 million, in total, of which $180 million was spent in Northern Ontario and $3.3 million in other parts of the province in order to get there.

This spending generated significant impacts in the North as well as in the province of Ontario. Overall, it generated $206 million of GDP province-wide through its direct, indirect and induced impacts. Of the $206 million GDP impact, $97 million were retained within the Northwestern economy, $51 million were retained within Northeastern economy and the remaining $59 million (or 28.5% of the total GDP impact) was generated in other parts of Ontario.

As with GDP, remote tourist spending had a significant impact on jobs. Overall, it supported 1,951 direct jobs in Northeastern Ontario (or 1,453 person years of employment), 3,079 jobs (or 2,298 person years) in Northwestern Ontario and 187 direct jobs (or 181 person years) in other parts of the province. The higher jobs-to-person years ratio in Northern Ontario, when compared to other parts of the province, reflects the more seasonal nature of the tourism industry in that region.

The total employment impact associated with initial tourist spending was 7,757 jobs (or 6,283 person years) province-wide. Of that impact, 85% was retained within Northern Ontario.

The direct employment impact accounted for 0.8% of Northeastern Ontario's employment, 2.7% of Northwestern's employment and 1.3% of Northern Ontario's total employment. The employment impact is higher in Northwestern Ontario because (a) tourist spending was higher there and (b) the Northwest's total employment is lower than that of the Northeast (115,957 vs. 258,247[1]).

The total employment impact that was retained within the northern economy accounted for 1.0% of Northeastern's employment, 3.5% of Northwestern's employment and 1.8% of Northern Ontario's total employment.

In total, $25.3 million of taxes were generated for the provincial government and $35 million for the federal government.

[1] Source: Statistics Canada, Labour Force Survey, Annual Averages, 1996

III. MAIN FINDINGS

F. Economic Impact (Cont'd)

2. Projections

Table 1 below presents a summary of the impacts associated with remote tourist spending. Table 2 shows the employment impacts for specific tourism related sectors.

Table 1[1]
Summary of Impacts
(Associated with remote tourist spending)

		North East	*North West*	*Total Ontario*
Initial Tourist Spending ($Millions)		61.7	118.4	183.4
Gross Domestic Product	Direct	31.0	60.3	97.5
	Total	51.0	96.5	206.3
Wages & Salaries ($Millions)	Direct	22.4	43.3	70.5
	Total	34.1	64.5	133.5
Employment (Person Years)	Direct	1,453	2,298	3,932
	Total	1,973	3,208	6,283
Employment (Jobs)	Direct	1,951	3,079	5,217
	Total	2,532	4,098	7,757
Taxes ($Millions)				
Direct		15.0	28.5	45.9
	Provincial	5.2	9.7	15.8
	Federal	6.6	12.6	20.4
	Municipal	3.2	6.2	9.7
Total		20.3	38.4	74.8
	Provincial	7.1	13.2	25.3
	Federal	9.1	17.3	34.9
	Municipal	4.1	7.9	14.6

[1] Source: MEDTT's economic impact model "T.R.E.I.M.". This model is based on Statistics Canada's Input Output tables for Ontario

Table 2[1]
Summary of Impacts
(Associated with remote tourist spending)

EMPLOYMENT GROUP	NORTH-EAST		NORTH-WEST	
	Total Employment	Directly Attributable to Remote Tourism	Total Employment	Directly Attributable to Remote Tourism
All industries	258,247	1,951	115,957	3,079
Retail[2]	35,684	102	15,572	173
Transportation[3]	6,409	50	3,913	88
Accommodation[4]	5,547	1,208	4,003	1,928
Food & Beverage Services[5]	13,837	449	6,451	592
Amusement & Recreation[6]	3,689	119	2,565	258
Other non-tourism industries	193,081	23	83,453	40

[1] Source: Statistics Canada, Labour Force Survey, 1996
[2] It includes the following industries: SICs 601-692
[3] It includes the following industries: SICs 451-454, 457-458, 996 and 992
[4] It includes the following industries: SICs 911-914
[5] It includes the following industries: SICs 921, 922
[6] It includes the following industries: SICs 962-969 and 855

Appendix

APPENDIX

GLOSSARY

Directly Attributable to Tourism

Refers to the portion of the tourism-related sectors' economic activity that is attributed to tourist spending.

Direct Impact

Refers to the impact that tourist spending has on the front line businesses serving these tourists (i.e., the tourism-related sectors).

Employment

All employment figures used in this document, with the exception of those *attributed to tourism*, are from Statistics Canada's "Labour Force Survey". This survey measures employment in terms of 'jobs', a concept that includes seasonal, part-time and full-time employees, as well as, self-employed and employees not receiving remuneration. The jobs that are *attributed to tourism* are generated by MEDTT's economic impact model (T.R.E.I.M.), which essentially converts tourist expenditures in a particular industry to jobs according to the industry's production process and part-time/full-time ratios.

GDP

This figure refers to the total value of wages and salaries, profits and indirect taxes (less subsidies) generated in the industries involved in the production process that is initiated with tourist spending.

Gross Output

Refers to the total sales achieved by all industries (direct and indirect) that participate in the production process initiated by tourist spending.

Indirect Impact

Refers to the economic impact resulting from the expansion of demand from the industries involved in the direct supply of goods and services to tourists, to other industries.

Induced Impact

Refers to the economic impact associated with the re-spending of labour income and/or profits earned in the industries that serve tourists directly and indirectly.

Municipal Taxes

Refers to business and property taxes collected by municipalities. Although in the long-term these taxes are correlated wit the economic health of the community, in the short-term these taxes may not be related to the community's economic fluctuations.

Travel Regions

Northern Ontario is divided into six travel regions: Sunset Country, comprised of the districts of Rainy River and the western third of Kenora; North of Superior, comprised of the districts of Thunder Bay and the middle third of Kenora; James Bay Frontier, comprised of the remaining section of Kenora and the district of Cochrane; Algoma County, comprised of the districts of Algoma and parts of Sudbury; Rainbow Country, comprised of the districts of Manitoulin, the remaining part of Sudbury (including the regional municipality of Sudbury) and the coastal part of Parry Sound; and Near North, comprised of the remaining part of Parry Sound, the district of Nipissing and Timiskaming.

Tourism Related Sectors

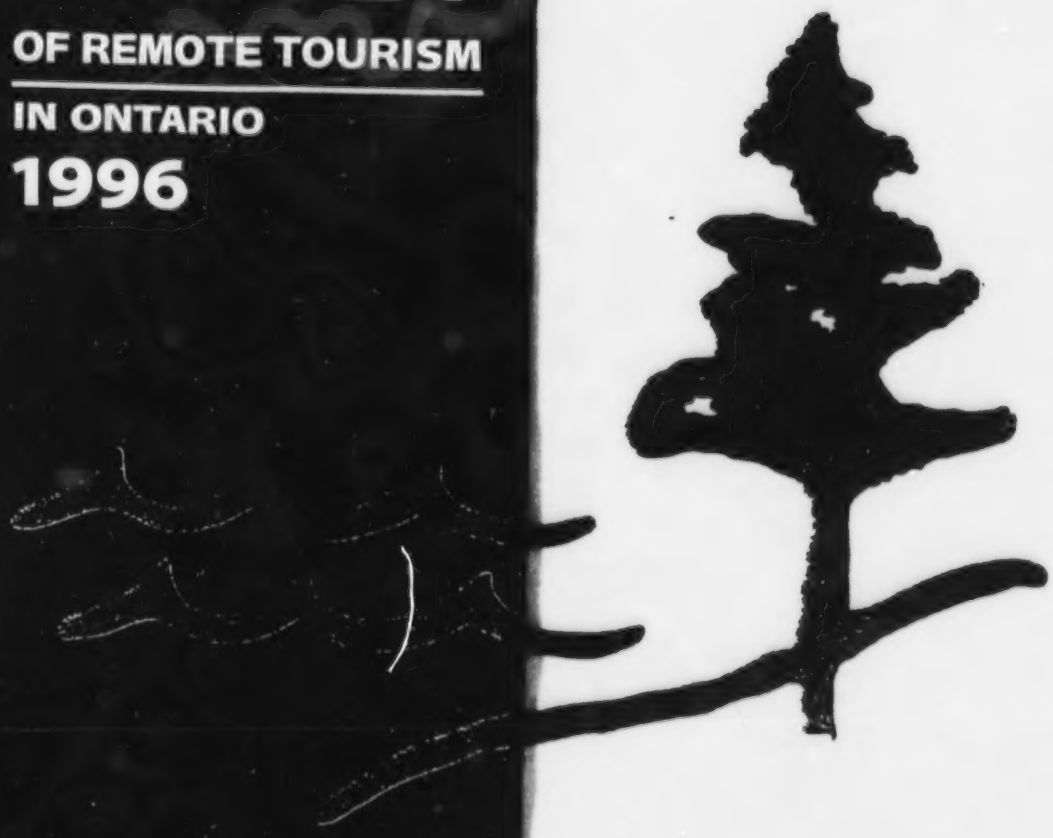
Refers to the sectors that supply the goods and services consumed by tourists. These sectors are: transportation (air, rail, bus and local), accommodation services, food and beverage services, amusement and recreation services, retail and 'other' services (car rental, travel agents). Although these sectors supply the goods and services consumed by tourists, they also supply goods and services consumed by non-tourists. As such, not all of these sectors' revenues and jobs are attributed to tourist spending.

SURVEY

OF REMOTE TOURISM

IN ONTARIO

1996



YOUR PARTICIPATION IS IMPORTANT

Participation in this survey is voluntary. If you require assistance in the completion of the questionnaire or have any questions regarding the survey, please contact a member of the staff of this tourism operation.

NOTE: Your answers are confidential

It is prohibited by law from publishing or releasing, in any manner, any statistics which would divulge personal information.

NOTE: If you have completed this questionnaire on a previous trip, please complete it again for this trip.

FOR OFFICE USE ONLY

Establishment # _____

Month # _____

— For all adults 18 years and older —

Dear Visitor,

You have come to a remote facility in Northern Ontario. "Remote" has been defined for this study as a location which can be accessed only by air, water, rail or private road (with a gate). This is an unusual experience, shared by relatively few people. Hopefully your experience is a very positive one.

The Ontario Ministry of Economic Development, Trade and Tourism is undertaking a study of all adult visitors, like yourself, in order to help improve visitor satisfaction and manage resources. The operator of this facility is helping in this study. You help them, as well as future visitors and the Ministry, by completing the following questionnaire. By helping in this manner, you will be influencing any changes that may take place in this area.

The Ontario Ministry of
Economic Development, Trade and Tourism

1. VISITOR PROFILE

The next few questions will help us categorize your answers. Please indicate which best describes <u>you</u> by marking an "x" in the appropriate box.

1a) Gender:

- Male ..... ☐ 1
- Female ..... ☐ 2

1b) Age:

- 18 - 24 ..... ☐ 3
- 25 - 34 ..... ☐ 4
- 35 - 44 ..... ☐ 5
- 45 - 54 ..... ☐ 6
- 55 - 64 ..... ☐ 7
- 65 or over ..... ☐ 8

1c) Which of the following best describes you:

- I live in Ontario ☐ 1
- I entered Ontario from another province ☐ 2
- I entered Ontario from the United States ☐ 3
- I entered Ontario directly from another country ☐ 4

1d) Where do you currently reside?

City: _____

Province/State:

- Ontario ☐ 1
- Quebec ☐ 2
- Manitoba ☐ 3
- Michigan ☐ 4
- Minnesota ☐ 5
- New York State ☐ 6
- Ohio ☐ 7
- Pennsylvania ☐ 8
- Other: _____

Country:

- Canada ☐ 1
- United States ☐ 2
- Other: _____

Postal/Zip Code: _____
(write in)

2. PARTY SIZE

2a) [Answer only one of i), ii), iii) or iv.)]
Which of the following best describes who you came with on this trip?

i) ☐1 Came alone

ii) ☐2 Came with other adult friends (only)
a) In total, how many adults (18 years or older) including yourself?
2☐ 3☐ 4☐ 5☐ 6☐ 7+ _____ (write in)

iii) ☐3 Came with members of my family (only)
a) In total, how many adults (18 years or older) including yourself?
2☐ 3☐ 4☐ 5☐ 6☐ 7+ _____ (write in)

☐4 b) How many children (under 18 years) and/or teens?
2☐ 3☐ 4☐ 5☐ 6☐ 7+ _____ (write in)

iv) ☐5 Came with family, plus another family, friends or relatives.
a) In total, how many adults (18 years or older) including yourself?

In your family:
2☐ 3☐ 4☐ 5☐ 6☐ 7+ _____ (write in)

Other adults:
2☐ 3☐ 4☐ 5☐ 6☐ 7+ _____ (write in)

b) In total, how many children (under 18 years) and/or teens?

In your family:
2☐ 3☐ 4☐ 5☐ 6☐ 7+ _____ (write in)

Other Children:
2☐ 3☐ 4☐ 5☐ 6☐ 7+ _____ (write in)

2b) Did you and/or your party come to this location as part of a tour group?

Yes ☐1 (part of a tour group)

No ☐2

3. PREVIOUS TRIPS

3a) What was the main purpose of this trip, that brought you to this remote establishment?

MARK ONLY ONE OR TWO IF EQUAL

Hunting	☐1	Boating	☐5
Fishing	☐2	Kayaking/Canoeing	☐6
Nature/Animal Observation	☐3	Hiking	☐7
Business Purposes	☐4	Visiting friends or relatives	☐8

Other: _____
(write in)

3b) In the past 24 months how many other trips (if any) have you made to each of the following remote locations where you have engaged in activities such as hunting, fishing, and nature observation.

PLEASE INDICATE NUMBER FOR EACH LOCATION.
IF NONE/NOT VISITED, PLEASE INDICATE IN SPACE PROVIDED. DO NOT INCLUDE THIS TRIP.

	Number of Trips Past 24 Months					No Other Trips
	1	2	3	4	5+	
i) This particular remote location	☐1	☐2	☐3	☐4	_____ (write in)	☐0
	1	2	3	4	5+	
ii) Other remote locations in Ontario	☐1	☐2	☐3	☐4	_____ (write in)	☐0
	1	2	3	4	5+	
iii) Other remote locations in the rest of Canada	☐1	☐2	☐3	☐4	_____ (write in)	☐0
	1	2	3	4	5+	
iv) Other remote locations in the United States	☐1	☐2	☐3	☐4	_____ (write in)	☐0
	1	2	3	4	5+	
v) Other remote locations in the rest of the world	☐1	☐2	☐3	☐4	_____ (write in)	☐0

4. ATTITUDES

4a) Do you think that your experience at this establishment was better or worse than that which you might experience at other remote establishments?
(If you haven't had any comparable experiences, please give an answer based on whatever you have seen, heard or read.)
Please rate this establishment for each of the following experiences, in the grid below.

4b) For each of these experiences, please indicate how important it was to your decision to come to this remote establishment. (Record below)

PLEASE CHECK APPROPRIATE BOX

Experiences	Question 4a: Worse than Others — Much Worse	Worse than Others — A Little Worse	About the Same	Better than Others — A Little Better	Better than Others — Much Better	Question 4b: Importance to your decision — Not that Important	Fairly Important	Extremely Important
The convenience of getting to the facility	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
The quality of the food at the facility	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
The quality of the accommodation	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
The quality of the service	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
Availability of other activities	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
Quality of the fishing experience	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
Quality of the hunting experience	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
The quality of the wilderness experience:								
Opportunities to see wildlife	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
Views and scenery	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
The untouched nature of the forest	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
The tranquillity/absence of other people	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
The absence of troublesome insects	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
The financial cost of the overall experience	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3

5 OVERALL SATISFACTION

5a) Overall, how satisfied would you say you were, on this trip, with your experience at this remote establishment? (MARK ONLY ONE BOX)

- Extremely satisfied..... ☐5
- Very satisfied..... ☐4
- Moderately satisfied..... ☐3
- Not very satisfied..... ☐2
- Not at all satisfied..... ☐1

5b) How likely is it that you will return to this remote tourism establishment, in the next two years, for another vacation? (MARK ONLY ONE BOX)

- Definitely will..... ☐5
- Probably will..... ☐4
- May or may not ..... ☐3
- Probably will not..... ☐2
- Definitely will not..... ☐1

PLEASE ANSWER THE FOLLOWING QUESTION IF YOU HAVE CHOSEN ANY OF THESE THREE RESPONSES.

I would not be inclined to return to this establishment because: (PLEASE INDICATE MAIN REASON)

- ☐1 Prefer different locations for each trip
- ☐2 Experience did not live up to expectations
  (PLEASE EXPLAIN) _____
- ☐3 Environment of location did not live up to expectations
  (PLEASE EXPLAIN) _____
- ☐4 Facilities at this establishment were poor
- ☐5 Did not receive good value for the money
- ☐6 Other: (write in) _____

5c) If asked by a friend or colleague whether or not you would recommend this northern establishment, would you... (MARK ONLY ONE BOX)

- Definitely recommend it..... ☐5
- Probably recommend it..... ☐4
- Might or might not recommend it..... ☐3
- Probably not recommend it..... ☐2
- Definitely not recommend it..... ☐1

6. LOGGING/MINING

ON THIS TRIP AT THIS ESTABLISHMENT, HAVE YOU SEEN OR HEARD EITHER...

6a) Any indications of logging?

- ☐1 No
- ☐2 Yes → (ANSWER Q.6b & Q.6c)

6b) What have you seen or heard?

Clear cut forestry	☐1
Selected trees cut down	☐2
Forest access roads	☐3
Logging noise	☐4
Cut logs in lakes/rivers	☐5

6c) To what extent has this logging activity affected your interest in returning to this location?

Improves access; a positive impact	☐1
It does not affect my interest	☐2
It will have some negative impact	☐3
It is one of the main reasons why I will not return	☐4

6d) Any indications of mining?

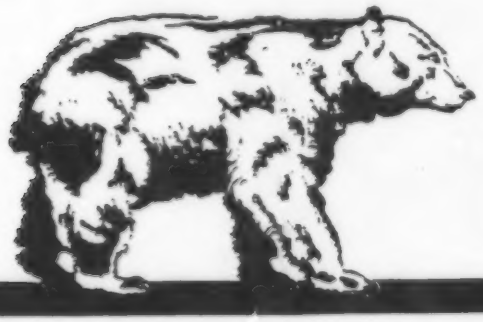
- ☐1 No
- ☐2 Yes → (ANSWER Q.6e & Q.6f)

6e) What have you seen or heard?

Pit or strip mining	☐1
Machinery	☐2
Mining access roads	☐3
Mining noise	☐4
Mining slag tailings	☐5

6f) To what extent has this mining activity affected your interest in returning to this location?

Improves access; a positive impact	☐1
It does not affect my interest	☐2
It will have some negative impact	☐3
It is one of the main reasons why I will not return	☐4



7. TRAVEL IN ONTARIO ON THIS TRIP

7a) How many nights in total do you plan to spend in Ontario on this trip? (CIRCLE)

0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 More than 14: _____ (write in)

7b) i) And how many of these nights are you planning to spend in this establishment? (CIRCLE)

0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 More than 14: _____ (write in)

ii) Please indicate the dates of your stay at this remote location:

Month ___ / Day ___ to Month ___ / Day ___

7c) How did you arrive at this establishment?

☐1 own car ☐2 rented car ☐3 own plane or boat ☐4 public train or boat
☐5 this establishment's plane, bus or boat ☐6 snowmobile ☐7 other

7d) Please tell us the other places in Ontario where you stopped before arriving at this establishment.

Places in Ontario where you stayed overnight or stopped to change your means of transport	Stop Only (check)	# of nights staying at this place	How did you get there? Own Car	Rented Car	A Canadian airline, train or bus	Other Public Transport	Own Plane or Boat	Snow-mobile
1_____	☐	_____	☐	☐	☐	☐	☐	☐
2_____	☐	_____	☐	☐	☐	☐	☐	☐
3_____	☐	_____	☐	☐	☐	☐	☐	☐

7e) Please tell us the places in Ontario where you are planning to stay after leaving this establishment.

Places in Ontario where you will be staying overnight or stopping to change your means of transportation	Stop Only (check)	# of nights staying at this place	How will you get there? Own Car	Rented Car	A Canadian airline, train or bus	Other Public Transport	Own Plane or Boat	Snow-mobile
1_____	☐	_____	☐	☐	☐	☐	☐	☐
2_____	☐	_____	☐	☐	☐	☐	☐	☐
3_____	☐	_____	☐	☐	☐	☐	☐	☐

8. EXPENDITURES

8a) Over the course of this trip, approximately how much money will you personally have spent in Ontario for yourself and any other member of your travelling party? Please include taxes and tips and exclude any prepaid package costs. (If applicable, report these prepaid costs at Q.8c). Also, include any amount spent by your employer for you, if applicable. (If you are sharing costs with someone, please report only the amount you personally will have spent.)

If you are a resident of a country other than Canada and you used a Canadian airline to enter/exit Ontario directly to/from your country or the USA., please include the cost of the fare.

Amount you personally spent $ _____ Cdn. [BEST ESTIMATE]
(NOT INCLUDING PREPAID PACKAGE — IF ANY)

If you are NOT reporting in Canadian dollars, please indicate other currency:

☐1 American Dollars

☐2 Other (WRITE IN COUNTRY AND CURRENCY) _____

8b) Does the amount shown above cover:...

☐1 The full cost of your trip while you were in Ontario (plus fares paid to Canadian airlines to enter/exit Ontario)

☐2 The full cost of your trip while you were in Ontario plus some or all of the cost of others in your travelling party

☐3 Less than the full cost of your trip (the remainder paid by someone else in your travelling party)

☐4 Less than the full cost of your trip (the remainder paid by someone else not in your travelling party)
(IF SO, Please estimate how much that person paid: $_____(Cdn))

8c) Was your stay at this remote tourism establishment purchased as a PREPAID package deal?

No ..... ☐1

Yes ..... ☐2 ➡ i) If "yes," how much did you personally spend on this package or packages?
$_____ (Cdn) (If part of the cost was paid for by someone not on this trip, please include the amount.)

ii) What items were included in the package? (Check all which apply)

☐1 Accommodation ☐2 Meals ☐3 Transportation
☐4 Guide Services ☐5 Fishing License ☐6 Hunting License
☐7 Other: _____
(write in)

8d) In total, approximately how much money will you personally have spent on each of the following items: (not including any prepaid package costs)

	Will you have spent money in Ontario on this item on this trip? →	No	Yes	If Yes, How much? (best estimate) CURRENCY
i)	Commercial transportation (air, train, boat, bus) *	☐1	☐2	$ _____
ii)	Local transportation (taxi, local buses, subway)	☐1	☐2	$ _____
iii)	Vehicle rental costs (not including gas)	☐1	☐2	$ _____
iv)	(If driving or flying on this trip) Gasoline and other private vehicle costs	☐1	☐2	$ _____
v)	Accommodation (if not part of a package) at this remote establishment	☐1	☐2	$ _____
vi)	Overnight accommodation before and after your stay at this remote establishment	☐1	☐2	$ _____
vii)	Food and beverage (if not part of a package) at this remote establishment	☐1	☐2	$ _____
viii)	Food and beverage (including alcohol) before and after this remote location	☐1	☐2	$ _____
ix)	Gifts/souvenirs (purchased on this trip in Ontario)	☐1	☐2	$ _____
x)	Licenses (hunting, fishing, etc.) paid for at this location	☐1	☐2	$ _____
xi)	Licenses (hunting, fishing, etc.) paid for elsewhere	☐1	☐2	$ _____
xii)	Guides (hunting, fishing, etc.) paid for at this location	☐1	☐2	$ _____
xiii)	Other expenses/costs/purchases (in total)	☐1	☐2	$ _____

* NOTE: If a Canadian airline was used as the mode of transportation to enter/exit Ontario, then please add the amount of the fare to item *i)* above. If a non-Canadian airline was used to enter/exit Ontario, do not include the amount of the fare.

If you are NOT reporting in Canadian dollars, please indicate other currency: ←

☐1 American $

☐2 Other _____
(WRITE IN COUNTRY AND CURRENCY)

9. DEMOGRAPHICS

9a) Please check one of the following categories for your total annual household income before taxes: [INTERNATIONAL CURRENCIES, PLEASE EXPRESS IN CANADIAN OR AMERICAN DOLLARS AND INDICATE CURRENCY CHOICE BELOW.]

Currency:
Canadian $ ☐
American $ ☐

Under $25,000 ..... ☐1
$25,000 to $39,999 ..... ☐2
$40,000 to $59,999 ..... ☐3
$60,000 to $79,999 ..... ☐4
$80,000 to $99,999 ..... ☐5
$100,000 to $149,999 ..... ☐6
$150,000 to $199,999 ..... ☐7
$200,000 or more..... ☐8

9b) In total, how many fishing or hunting trips have you taken in the past two years to any destination (including this one if applicable)? Include both remote and non-remote trips, where you have stayed overnight.

Number of overnight trips						
1	2	3	4	5	6-10	11+
☐1	☐2	☐3	☐4	☐5	☐6	☐7

9c) What is your occupation?

Management/Professional ☐1
Sales/Clerical ☐2
Blue Collar ☐3
Student ☐4
Retired ☐5
Unemployed ☐6
Homemaker ☐7

9d) In order to group your answers with those of everyone else, please indicate:

What type of facility did you stay in the most number of nights at this remote establishment?

Record only one below

a) Outpost cabin..... ☐1
b) Campground..... ☐2
c) Fixed roof accommodation (lodge/resort/hotel) without a restaurant
  i) With a kitchen..... ☐3
  ii) Without a kitchen..... ☐4
d) Fixed roof accommodation (lodge/resort/hotel) with a restaurant
  iii) Offering an American plan (meals included with accommodation cost)..... ☐5
  iv) Not offering an American plan..... ☐6

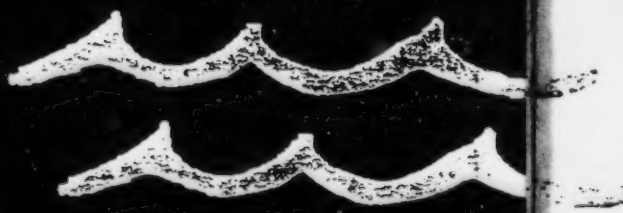
10) Please record your phone number in case we need to clarify your answers.

☐☐☐-☐☐☐-☐☐☐☐
AREA CODE TELEPHONE NUMBER

SONDAGE

du tourisme à un endroit éloigné

Visiteurs en Ontario 1996



Votre participation est importante

La participation à ce sondage est volontaire. Si vous avez besoin d'assistance pour remplir le questionnaire ou si vous avez des questions en ce qui concerne le sondage, veuillez vous adresser à un membre du personnel de cette exploitation touristique.

NOTE: Vos réponses sont confidentielles

Il est interdit par la loi de publier ou de communiquer, d'une façon ou d'une autre, toutes statistiques qui révéleraient des renseignements personnels.

Veuillez remplir et retourner ce questionnaire à un membre du personnel de cette exploitation touristique avant de partir.

RÉSERVÉ AU BUREAU

N^{O} d'établissement _____

N^{O} du mois _____

Pour tous les adultes âgés de 18 ans ou plus

Cher visiteur, chère visiteuse,

Vous êtes venu(e) à une installation éloignée dans le Nord de l'Ontario. Dans le but de cette étude, "éloignée" signifie un endroit accessible seulement par avion, par bateau, par train ou par route privée (fermée par une barrière). Il s'agit d'une expérience peu commune, que partage un nombre relativement petit de personnes. Nous espérons que votre séjour sera très agréable.

Le Ministère de l'Expansion économique, du Commerce et du Tourisme de l'Ontario entreprend une étude de tous les visiteurs adultes comme vous dans le but d'améliorer la satisfaction des visiteurs et de gérer les ressources. L'exploitant de cette installation nous aide à effectuer cette étude. Vous les aiderez ainsi que de futurs visiteurs et le Ministère en remplissant le questionnaire suivant. Vos réponses et vos opinions influenceront tout changement qui pourrait avoir lieu dans cette région.

Le Ministère de l'Expansion économique, du Commerce et du Tourisme de l'Ontario

NOTE: Si vous avez déjà rempli ce questionnaire lors d'un voyage précédent, veuillez le remplir une nouvelle fois pour ce voyage-ci.

1. PROFIL DES VISITEURS

Les questions suivantes nous aideront à catégoriser vos réponses. Veuillez indiquer laquelle vous décrit le mieux en faisant un "x" dans la case appropriée.

1a) Sexe du répondant:

- ☐ 1 Homme
- ☐ 2 Femme

1b)

- ☐ 3 18 à 24 ans
- ☐ 4 25 à 34 ans
- ☐ 5 35 à 44 ans
- ☐ 6 45 à 54 ans
- ☐ 7 55 à 64 ans
- ☐ 8 65 ans ou plus

1c) Laquelle des catégories suivantes vous décrit le mieux:

- ☐ 1 Je vis en Ontario
- ☐ 2 Je suis arrivé(e) en Ontario d'une autre province
- ☐ 3 Je suis arrivé(e) en Ontario des États-Unis
- ☐ 4 Je suis arrivé(e) en Ontario directement d'un autre pays

1d) Où demeurez-vous actuellement?

Ville: _____

Province/état:

- ☐ 1 Ontario
- ☐ 2 Québec
- ☐ 3 Manitoba
- ☐ 4 Michigan
- ☐ 5 Minnesota
- ☐ 6 New York State
- ☐ 7 Ohio
- ☐ 8 Pennsylvania

Autre: _____

Pays:

- ☐ 1 Canada
- ☐ 2 États-Unis

Autre: _____

Code postal/zip code: _____

2. NOMBRES DE PERSONNES DANS VOTRE GROUPE

2a) **[Répondez seulement à i), ii), iii) ou iv.)**
Veuillez indiquer le nombre de personnes qui vous ont accompagné lors de ce voyage.

i) ☐₁ **Je suis venu(e) seul(e)**

ii) ☐₂ **Je suis venu(e) avec d'autres amis adultes (seulement)**
a) Nombre total d'adultes (de 18 ans ou plus), en vous comptant.
☐₂ ☐₃ ☐₄ ☐₅ ☐₆ 7+ _____

ii) ☐₃ **Je suis venu(e) avec des membres de ma famille (seulement)**
a) Nombre d'adultes (de 18 ans ou plus), en vous comptant.
☐₂ ☐₃ ☐₄ ☐₅ ☐₆ 7+ _____

☐₄ **b) Nombre d'enfants (de moins de 18 ans) et/ou d'adolescents.**
☐₂ ☐₃ ☐₄ ☐₅ ☐₆ 7+ _____

iv) ☐₅ **Je suis venu(e) avec ma famille et une autre famille, des amis ou des parents.**
a) Nombre total d'adultes (de 18 ans ou plus), en vous comptant.

Dans votre famille:
☐₂ ☐₃ ☐₄ ☐₅ ☐₆ 7+ _____

Autres adultes:
☐₂ ☐₃ ☐₄ ☐₅ ☐₆ 7+ _____

b) Nombre total d'enfants (de moins de 18 ans) et/ou d'adolescents.
Dans votre famille:
☐₂ ☐₃ ☐₄ ☐₅ ☐₆ 7+ _____

Autres enfants:
☐₂ ☐₃ ☐₄ ☐₅ ☐₆ 7+ _____

2b) **Est-ce que vous et/ou les personnes qui vous accompagnent êtes venus à cet endroit en voyage organisé?**

Oui ☐₁ **(en voyage organisé)**

Non ☐₂

3. VOYAGES PRÉCÉDENTS

3a) Quel était le but principal de ce voyage, la raison pour laquelle vous êtes venu(e) à cet établissement éloigné?

FAITES UN SEUL X OU DEUX EN CAS DE DEUX RAISONS ÉGALES

1 Chasse	☐1	5 Navigation de plaisance	☐5
2 Pêche	☐2	6 Kayak/canoëisme	☐6
3 Nature/observation des animaux	☐3	7 Randonnées/excursions à pied	☐7
4 Pour affaires	☐4	8 Rendre visite à des amis ou des parents	☐8

Autre: _____
(précisez)

3b) Veuillez décrire d'autres voyages semblables que vous avez faits au cours des deux dernières années (24 mois) à des endroits éloignés. [FAITES UN 'X' DANS CHAQUE CASE PERTINENTE.]

Au cours des deux (2) dernières années, s'il y a lieu, combien d'autres voyages avez-vous faits à chacun des endroits éloignés suivants où vous vous êtes livré(e) à des activités semblables à celles de ce voyage? VEUILLEZ INDIQUER LE NOMBRE POUR CHAQUE ENDROIT. SI AUCUN/PAS D'AUTRE VOYAGE, VEUILLEZ L'INDIQUER DANS L'ESPACE PRÉVU À CET EFFET. NE COMPTEZ PAS CE VOYAGE.

	Nombre de voyages ces 2 dernières années					Pas d'autre voyage
	1	2	3	4	5+	
i) Cet endroit éloigné particulier	☐1	☐2	☐3	☐4	_____ (précisez)	☐0
	1	2	3	4	5+	
ii) Autres endroits éloignés en Ontario	☐1	☐2	☐3	☐4	_____ (précisez)	☐0
	1	2	3	4	5+	
iii) Autres endroits éloignés ailleurs au Canada	☐1	☐2	☐3	☐4	_____ (précisez)	☐0
	1	2	3	4	5+	
iv) Autres endroits éloignés aux États-Unis	☐1	☐2	☐3	☐4	_____ (précisez)	☐0
	1	2	3	4	5+	
v) Autres endroits éloignés ailleurs dans le monde	☐1	☐2	☐3	☐4	_____ (précisez)	☐0

4. ATTITUDES

4a) Pensez-vous que l'expérience que vous avez vécue à cet établissement était meilleure ou moins bonne que celle qui est offerte à d'autres établissements éloignés? (Si vous n'avez pas vécu d'expérience comparable, veuillez donner une réponse d'après ce que vous avez vu, lu ou entendu.) Veuillez évaluer cet établissement en fonction de chacun des aspects suivants, dans la grille ci-dessous.

4b) Pour chacun de ces aspects, veuillez indiquer son importance pour influencer votre décision de venir à cet établissement éloigné. (Indiquez-le ci-dessous.)

VEUILLEZ FAIRE UN 'X' AU NOMBRE APPROPRIÉ

	Question 4a					Question 4b		
	Moins bonne que la moyenne			Meilleure que la moyenne		Importance à votre décision		
Aspects	Bien moins bonne	Un peu moins bonne	Moyenne	Un peu meilleure	Bien meilleure	Pas tellement important	Assez important	Extrêmement important
La facilité d'arriver à l'établissement	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
La qualité des aliments à l'établissement	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
La qualité du logement	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
La qualité du service	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
Disponibilité d'autres activités	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
Qualité de la pêche	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
Qualité de la chasse	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
La qualité de la région sauvage:								
Occasions de voir la faune	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
La vue et le paysage	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
La nature sauvage de la forêt	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
La tranquillité/l'absence d'autres personnes	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
L'absence d'insectes ennuyeux	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3
Le coût financier de ce séjour dans l'ensemble	☐1	☐2	☐3	☐4	☐5	☐1	☐2	☐3

5 SATISFACTION GÉNÉRALE

5a) Dans quelle mesure êtes-vous satisfait(e), dans l'ensemble, de votre séjour à cet établissement éloigné lors de ce voyage? (FAITES UN 'X' DANS UNE SEULE CASE)

- Extrêmement satisfait(e) ☐5
- Très satisfait(e) ☐4
- Moyennement satisfait(e) ☐3
- Pas très satisfait(e) ☐2
- Pas du tout satisfait(e) ☐1

5b) À quel point est-il probable que vous reveniez à cet établissement touristique éloigné, au cours des deux prochaines années, pour d'autres vacances? (FAITES UN 'X' DANS UNE SEULE CASE)

- Je le ferai certainement ☐5
- Je le ferai probablement ☐4
- Je le ferai peut-être ou peut-être pas ☐3
- Je ne le ferai probablement pas ☐2
- Je ne le ferai certainement pas ☐1

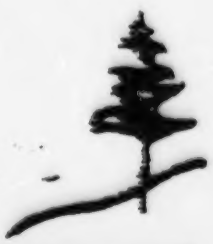
VEUILLEZ RÉPONDRE À LA QUESTION SUIVANTE SI VOUS AVEZ CHOISI L'UNE DE CES TROIS RÉPONSES.

Je ne serais pas porté(e) à revenir à cet établissement parce que (VEUILLEZ INDIQUER LA RAISON PRINCIPALE)

- ☐1 Je préfère aller à des endroit différents à chaque voyage
- ☐2 L'expérience que j'ai vécue n'a pas répondu à mes attentes
  (VEUILLEZ EXPLIQUER) _____
- ☐3 Les environs n'ont pas répondu à mes attentes
  (VEUILLEZ EXPLIQUER) _____
- ☐4 Les installations à cet établissement étaient décevantes
- ☐5 Je n'ai pas obtenu un bon rapport qualité-prix
- ☐6 Autre: (précisez) _____

5c) Si un ami ou un collègue vous demandait si vous recommanderiez cet établissement dans le Nord, est-ce que vous... (Faites un 'x' dans une seule case)

- Le recommanderiez certainement ☐1
- Le recommanderiez probablement ☐2
- Le recommanderiez peut-être ou peut-être pas ☐3
- Ne le recommanderiez probablement pas ☐4
- Ne le recommanderiez certainement pas ☐5



6. EXPLOITATION FORESTIÈRE/MINIÈRE

6a) Lors de ce voyage à cet établissement, avez-vous vu ou entendu ....

Des signes d'exploitation forestière?

- ☐1 Non
- ☐2 Oui (RÉPONDEZ À LA Q.6b ET Q.6c)

6b) Qu'avez-vous vu ou entendu?

- Coupe à blanc ☐1
- Coupe d'arbres choisis ☐2
- Routes accessibles à la forêt ☐3
- Entendu des bruits d'abattage/ de façonnage ☐4
- Rondins dans les lacs/rivières ☐5

6c) Jusqu'à quel point cette exploitation forestière a-t-elle influencé votre intérêt à revenir à cet endroit?

- Pas influencé mon intérêt ☐1
- Elle aura quelque influence ☐2
- C'est la raison principale pour laquelle je ne reviendrai pas ☐3

Des signes d'exploitation minière?

- ☐1 Non
- ☐2 Oui (RÉPONDEZ À LA Q.6b ET Q.6c)

6b) Qu'avez-vous vu ou entendu?

- Exploitation par découverte/ de surface ☐1
- Machines ☐2
- Entendu des bruits d'abattage/ d'extraction ☐3

6c) Jusqu'à quel point cette exploitation minière a-t-elle influencé votre intérêt à revenir à cet endroit?

- Pas influencé mon intérêt ☐1
- Elle aura quelque influence ☐2
- C'est la raison principale pour laquelle je ne reviendrai pas ☐3

7. DÉPLACEMENTS EN ONTARIO LORS DE CE VOYAGE

7a) Nous aimerions avoir des renseignements sur vos déplacements en Ontario lors de ce voya
les endroits où vous avez passé ou passerez la nuit, et les endroits où vous changez de moy
de transport.

- Veuillez commencer avec le premier endroit en Ontario, après votre départ, où vous avez passé la nuit ou avez changé de moyen de transport.
- Continuez jusqu'à votre séjour actuel à cet établissement éloigné.
- Puis continuez encore, pour indiquer l'endroit où vous resterez ou changerez votre moyen de transport <u>après</u> votre départ de cet établissement éloigné.

Veuillez indiquer le moyen de transport que vous prenez pour <u>arriver</u> à chaque endroit où vous pa la nuit ou changez de moyen de transport.

Endroits où vous passez la nuit ou changez de moyen de transport. (ÉCRIVEZ LE NOM DE LA VILLE OU DE L'ÉTABLISSEMENT ÉLOIGNÉ)	Nombre de nuits (0 ou plus)	Moyen de transport utilisé pour arriver à chaque endro: Auto privée	Auto louée	Autobus	Train	Motoneige	Bateau	Ligne aérienne canadienne	Autre ligne aérienne	L'avion de cet établissement éloigné
1. _____	_____	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
2. _____	_____	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
3. _____	_____	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
4. _____	_____	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
5. _____	_____	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
6. _____	_____	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
7. _____	_____	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9

7b) Combien de nuits en tout prévoyez-vous passer en Ontario lors de ce voyage?

Nombre de nuits

1	2	3	4	5	6	7	8	9	10	11	12	13	14	Plus de 1
☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9	☐10	☐7	☐8	☐9	☐10	_____ (précisez)

Veuillez vérifier que le nombre de nuits que vous avez indiqué ci-dessus [à la Q.7a] soit égal au nombre total nuits que vous prévoyez passer en Ontario lors de ce voyage (y compris les nuits que vous passez à cet établissement éloigné).

9. DONNÉES DÉMOGRAPHIQUES

9a) **Veuillez faire un X dans l'une des cases suivantes pour indiquer le revenu total annuel de votre foyer avant impôts:** [DEVISES INTERNATIONALES: VEUILLEZ CONVERTIR EN DOLLARS CANADIENS OU AMÉRICAINS ET INDIQUEZ LE TYPE DE DEVISES CHOISI CI-DESSOUS.]

Devises: ☐1 $ canadiens
☐2 $ américains

Moins de 25 000 $	☐1
25 000 $ à 39 999 $	☐2
40 000 $ à 59 999 $	☐3
60 000 $ à 79 999 $	☐4
80 000 $ à 99 999 $	☐5
100 000 $ à 149 999 $	☐6
150 000 $ à 199 999 $	☐7
200 000 $ ou plus	☐8

9b) **Combien de voyages de pêche ou de chasse avez-vous faits en tout au cours des deux dernières années à une destination quelconque? Comptez les voyages à un endroit éloigné et non éloigné, où vous avez passé la nuit.**

Nombre de voyages d'une nuit ou plus

1	2	3	4	5	6-10	11+
☐1	☐2	☐3	☐4	☐5	☐6	☐7

9c) **Quelle est votre occupation?**

Employé(e), col bleu	☐1
Employé(e), col blanc	☐2
Je travaille à mon compte	☐3
Étudiant(e)	☐4
Retraité(e)	☐5
En chômage/sans emploi	☐6

9d) **Afin que nous puissions grouper vos réponses avec celles des autres répondants, veuillez indiquer:**

À quel genre d'installation vous êtes resté(e) à cet établissement éloigné.
(Faites un X à une seule case ci-dessous.)

a) Cabine avant-poste	☐1
b) Terrain de camping	☐2
c) Hébergement à toit fixe sans restaurant	
i) Avec cuisine	☐3
ii) Sans cuisine	☐4
d) Hébergement à toit fixe avec restaurant	
iii) Offrant une pension complète (repas compris dans le coût d'hébergement)	☐5
iv) N'offrant pas de pension complète	☐6

IMPORTANT

Veuillez inscrire votre numéro de téléphone au cas où nous aurions besoin de vous appeler pour obtenir des précisions à vos réponses.

INDICATIF RÉGIONAL ☐☐☐

NUMÉRO DE TÉLÉPHONE ☐☐☐☐☐☐☐

MERCI DE VOTRE COLLABORATION